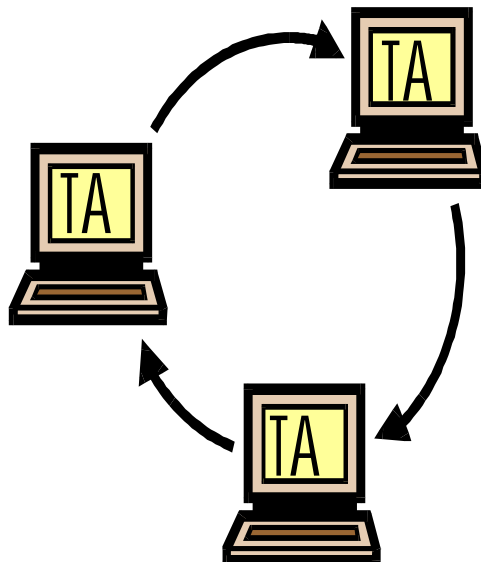




# **PUBLIC TRANSPORTATION MANAGEMENT SYSTEM**



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1.

## Overview

Last Chapter Update: 12/8/98

## Background

The Intermodal surface Transportation Act of 1991 (ISTEA) originally required all states to establish management systems. These were to be the tools for planning, engineering and programming processes. To a department accustomed to optimizing its resources, that only made good business sense. Thus, despite rescission of the federal mandates, MDOT continues its efforts and its commitment to providing the transportation infrastructure and service providers of Michigan with the tools necessary to build, maintain and operate/manage a high quality, seamlessly integrated, multimodal transportation system. The Transportation Management System (TMS) includes six groups of tools:

- Bridge Management System (BMS)
- Congestion Management System (CMS)
- Intermodal Management System (IMS)
- Pavement Management System (PMS)
- Public Transportation Management System (PTMS)
- Safety Management System (SMS)

MDOT has identified three other systems that are also being added: Real Estate, Construction and Maintenance.

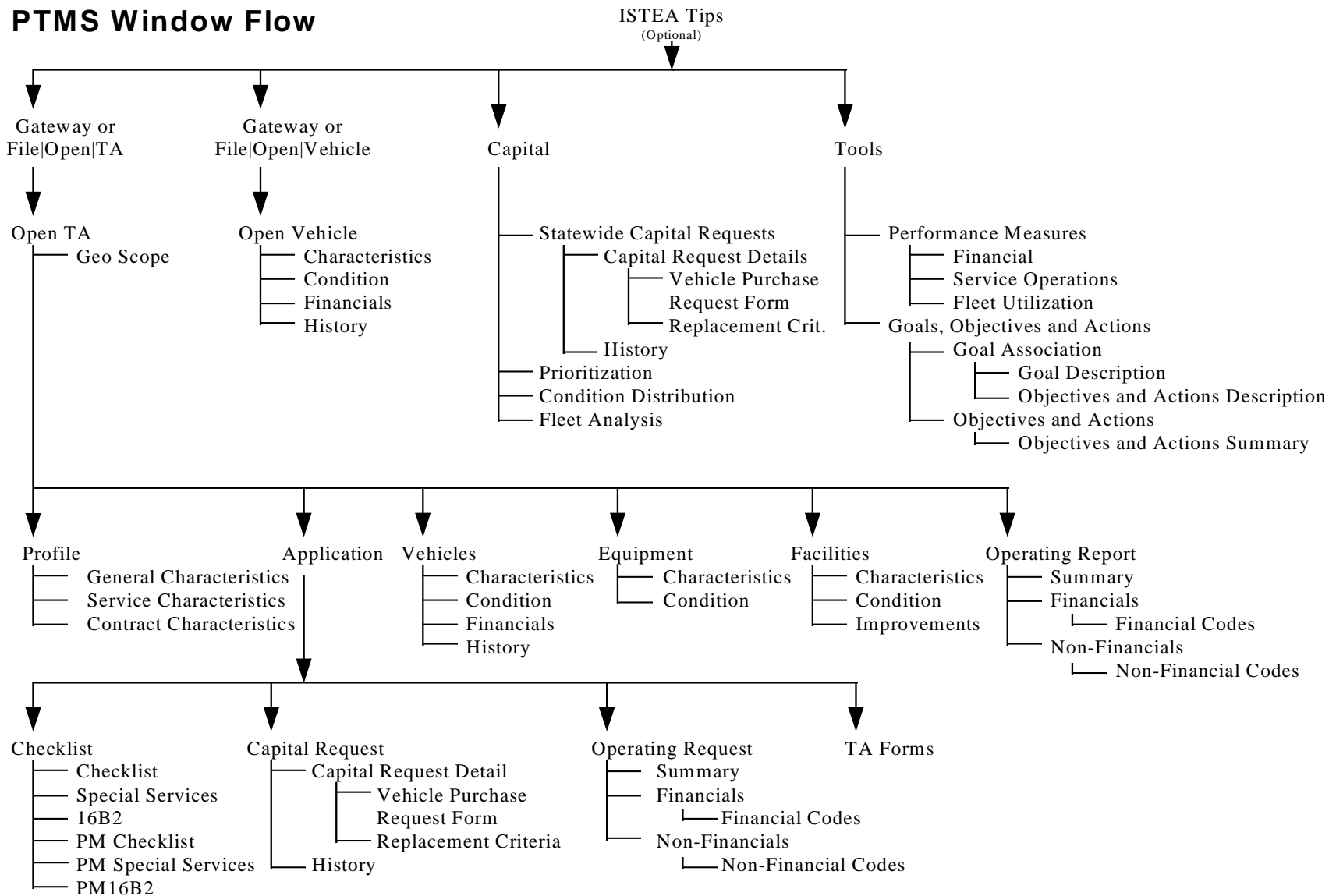
All of these management systems are accessible from your TMS computer. This document focuses on how to use the PTMS. Accessing the other management systems is comparable and you are welcome to look into any of the systems.

**We are continuously working on the PTMS – upgrading screens, and adding new functionality. Please feel free to call with any comments or suggestions you may have. We expect to find better ways of utilizing the PTMS with your help. Please call your project manager or Kathy Urda (517) 335-2575 with your comments.**

## PTMS Window Flow

The flowchart on the next page diagrams the relationships and flow between the windows in PTMS. This manual will explain how to access each window, and what is done in each window.

## PTMS Window Flow



## **System Basics & Conventions**

Last Chapter Update: 12/8/98

# Systems Basics & Conventions

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## Overview

The purpose of this chapter is to familiarize the PTMS user with the basic operations and functionality of the PTMS application. Topics include starting and exiting the system, system format and layout, window types and functions, active record and field, command selection, data entry tools, and miscellaneous operations.

## PTMS Environment

PTMS is a **client/server** application. On a standalone computer, any program you run is responsible for keyboard input, retrieving data from the disk, and displaying data. In a client/server environment, processing is divided between the client system and the server. Each application, such as PTMS, includes two programs. One program is a client, and the other is a server.

There are three components in a client/server environment:

- Client - Individual user's computer
- Network - The hardware/software allowing the client and server to communicate
- Server - The computer storing and operating the database

A user's client application is controlled locally on his/her own computer. Any user can request data from the server. The network manages these requests and responses.

The client manages the presentation of PTMS, performs its application level processing, and sends out requests for services to the server. The network provides connectivity between the client and server, maintains communication between them, and delivers requests and results. The server provides application and file services, contains the database and its management system, facilitates communication, ensures security, and executes stored procedures supported by the database.

There are many benefits associated with the client/server environment. The key components work together to reduce network traffic to queries from the client and results sets from the server. Any of the key elements can be replaced without major impacts on the other elements. New technology can be easily incorporated into the system, and the hardware for the client and server are less expensive than a mini or mainframe system.

# Systems Basics & Conventions

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## Accessing PTMS

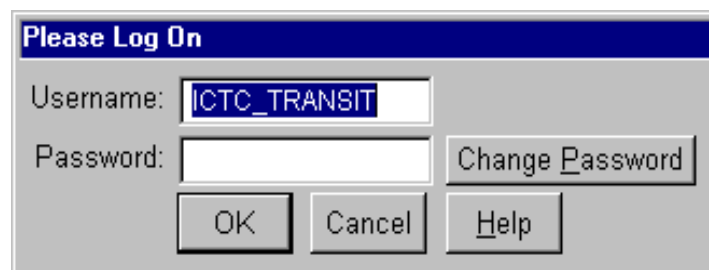
To access PTMS, a computer system with Windows NT 4.0 or Windows 95, and the PTMS software is required. For remote connections (outside of MDOT offices), a modem, SQLNET (database access software provided by MDOT), the PTMS software, and an Internet Service Provider (ISP) is required for connection.

Assuming appropriate equipment, software, and set-up, local users will simply double-click on the TMS icon to launch the TMS application.

For remote users, assuming appropriate equipment, software, and set-up, in Window NT the user will double click on the Access to Internet shortcut (the shortcut located on the NT desktop that provides access to your Internet Service Provider). When connection is made to the ISP, the user will then double-click the TMS icon.

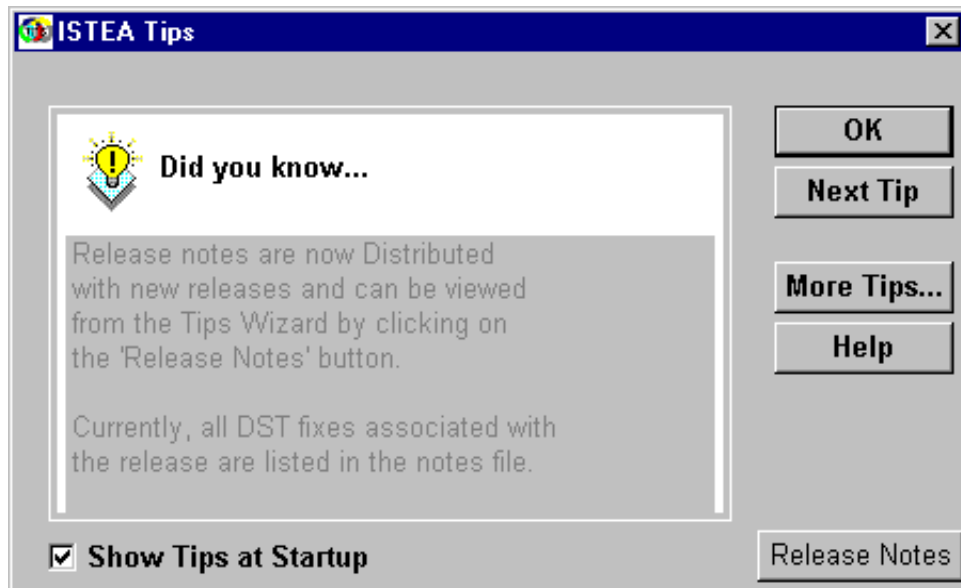
## Starting PTMS

The user will start PTMS by double-clicking on the PTMS application icon illustrated at the right in the normal Windows fashion. As a result of this action the Please Log On dialog box will be displayed, as illustrated below.



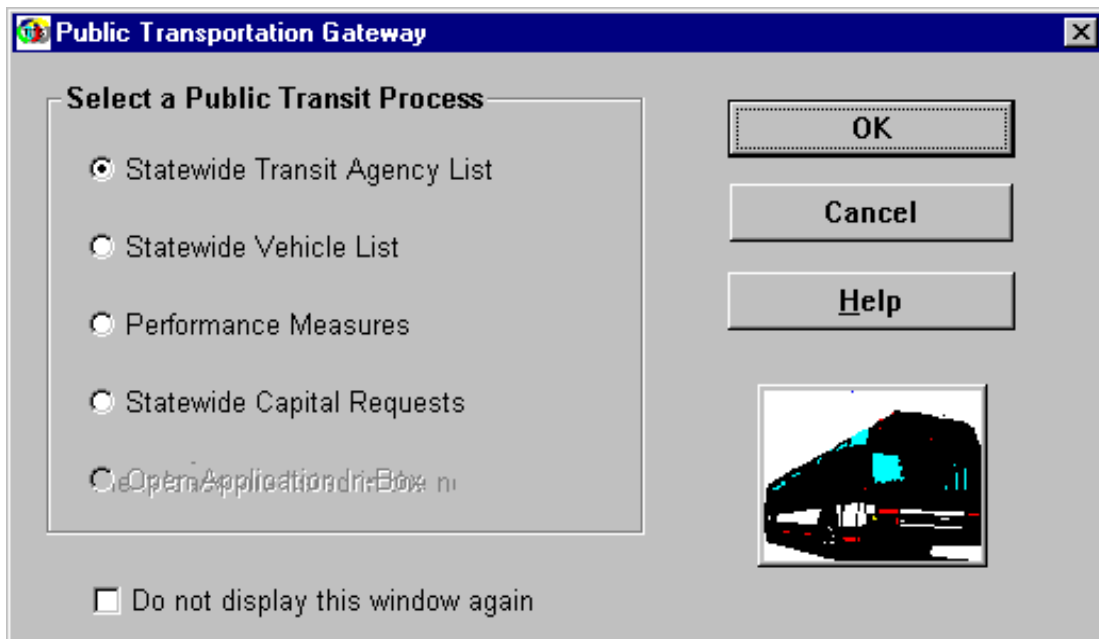
The **Username** field will already be filled in by the system. If the user name is not correct, the user will first enter the correct name. Once the user name is correct, the user can tab to, or click in the **Password** field to enter his/her PTMS password. Once the password has been correctly entered, the user will press the [ENTER] key, or click on the **OK** button. As a result of this action, PTMS will start, and the **ISTEA Tips** window is opened, as illustrated on the following page.

# Systems Basics & Conventions



This Tip window will be displayed whenever PTMS starts unless the **Show Tips at Startup** check box in the lower left corner is unmarked. The user can access other tips, help, and release notes through the command buttons in this window. To close this window and continue the starting of PTMS, the user will click on the **OK** button.

Doing so may open the **Public Transportation Gateway** dialog box will be opened, as illustrated below.



# Systems Basics & Conventions

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The user will indicate by clicking on the desired choice whether the user wishes to **View Transit Agencies**, **View Vehicle List**, or **Open Application In-Box**. If the user does not want the Gateway window to appear when PTMS is started, the user can select the **Do not display this window again** check box.

If the user does make this selection, and at some later time does wish to access the Gateway window, the user can select **Gateway** under the **File** pull-down menu in the **Main Menu** window.

If the Gateway is not displayed, the user can access the indicated modules of PTMS by selecting the desired menu option under the **File/Open** menu from the PTMS Main Menu window.

Once the desired options are selected in this window, the user will press **[ENTER]** or click the **OK** button, and the PTMS Main Menu window will open, as illustrated in the next section.

# Systems Basics & Conventions

## PTMS Systems Format & Layout

Below is an illustration of the PTMS Main Menu window associated with the Transit Agencies list. This window is the first to open when the user starts PTMS, and selects **Statewide Transit Agency List**, as discussed starting on page 2.3.

The screenshot shows the 'Open TA' window with the following sections:

- State Wide**: Includes 'Urban' and 'Non Urban' sub-sections. 'Urban' has checkboxes for Metro, Medium, Large, and Small. 'Non Urban' has checkboxes for County, Township, and City.
- Service Types**: Includes checkboxes for S. Services, Ongoing, and New. A 'Custom' checkbox is checked, with an 'Apply' button and a 'Save selected TAs' button.
- Geo Scope**: Includes a 'Geo Scope' button, a 'Change Geo Scope' button, and an 'Apply Geo Scope' button.
- Table**: A table with columns 'Agency ID', 'Agency Name', and 'Address'. The first row contains the data: 382161440, ISABELLA CO TRANSPORTATION COMMIS, 4590 E. PICKARD MT. PLEASANT.

The status bar at the bottom shows 'Ready' and the date/time '7/17/98 9:52 AM'.

| Agency ID | Agency Name                       | Address                      |
|-----------|-----------------------------------|------------------------------|
| 382161440 | ISABELLA CO TRANSPORTATION COMMIS | 4590 E. PICKARD MT. PLEASANT |

A user familiar with Windows will notice a number of standard Windows' features, which function in the normal Windows fashion, and are discussed in detail starting in the **Windows Basics** section.

# Systems Basics & Conventions

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## User groups for PTMS and their “Rights”

Each user of PTMS belongs to one or more PTMS user groups, which control user access to, and functionality in, PTMS. These groups and their related rights are described in the table below. Note that this manual covers functionality for all user groups, and therefore some of the screens and operations described in the manual may not be accessible to you, or function as described for you.

|   |  |
|---|--|
| <b>Project Managers</b><br>(MDOT)   | Can view all information. Can change some information associated with agencies to which they are assigned. CAN NOT create or edit new OARs, cannot create new Annual Applications, and CAN NOT enter new vehicle, equipment or facility information. Can change OAR status to Resubmit so TA can edit OAR. |
| <b>MDOT Management</b><br>(Unit and Section Supervisors within PTD)                                   | Can view information. Can change some information associated with transit agencies to which their employees are assigned depending on the status of the information.   |
| <b>MDOT Upper Management</b><br>(Division and Bureau level Managers)                                  | Can view all information.  |
| <b>Vehicle Inventory</b><br>(MDOT)  | Can view all information. Can change all information associated with vehicles.   |
| <b>Financial Management</b><br>(Person responsible for Operating Assistance Reports (OAR) within PTD) | Can view all information. Can create new OARs, but can not edit OARs submitted by TAs.   |
| <b>Metropolitan Planning Organizations</b><br>(MPO)   | Can view all information.  |

# Systems Basics & Conventions

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## **Transit Agencies**

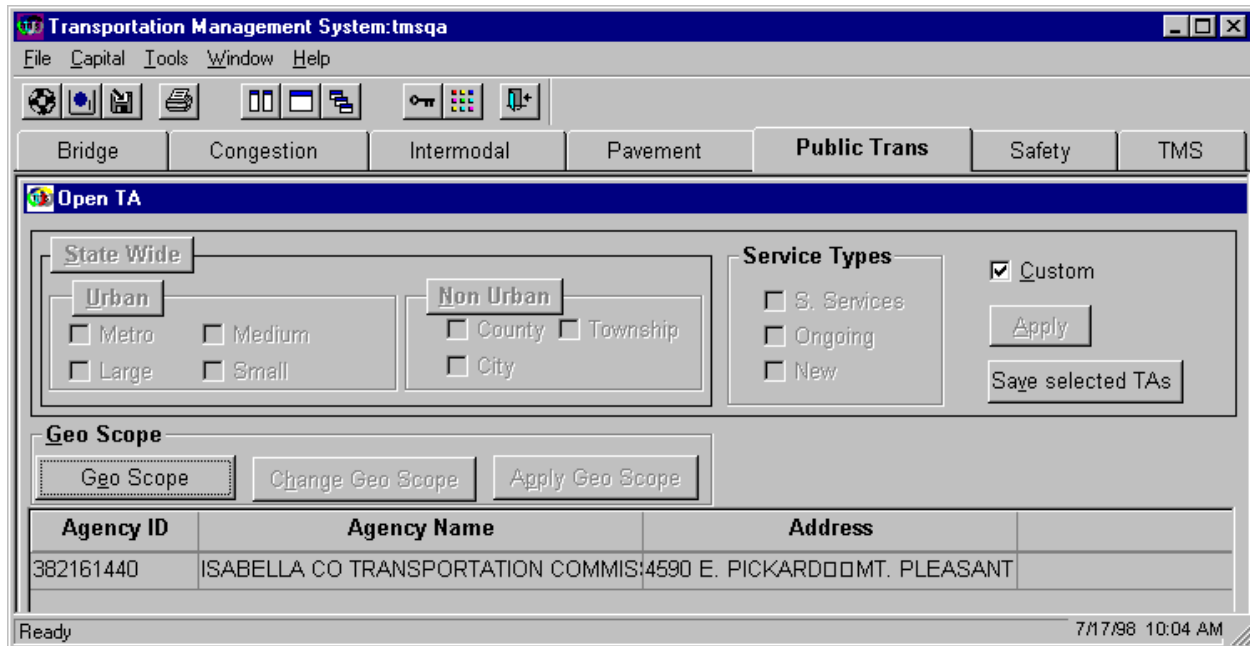
Can view all information. Can change most information associated with THEIR OWN agency depending on the status of the information (TA's have exclusive rights to changing data associated with their own TA when the item is in pre-submit or re-submit status). Can create new OAR's, Annual Applications (and all associated requests), add new vehicles, equipment, and facilities, and change Profile Information.

## **Super User** (PTMS Specialist at MDOT)

Can view all information. Can change or delete any information as necessary.

# Systems Basics & Conventions

## Windows Basics



In the illustration above, note that there are two Title Bars, the upper one for the PTMS application itself, and the lower one for the active window within PTMS. The maximize, minimize, and close buttons in the upper right corner of each window function in the normal Windows fashion. The Status Bar at the bottom of the window is active in PTMS, and does provide useful information to the user concerning items to which the mouse indicator is pointing, and the current processing status of the application.

There is a Menu Bar immediately below the upper Title Bar, and a Tool Bar right below that. The function of these bars will be covered in the section on Command Selection on page 2.15.

Right below the Tool Bar are the Window Tabs that indicate that there are a number of Window Layers accessible from this Main Menu window. The user will note that the window tab of the currently active window layer (the one that is currently visible) is always in bold face type. Here the layers each represent a different system within the PTMS family. Note that Public Trans is active, since we are currently in the PTMS application. More information about layered windows will be presented in the section on Operation of Layered Windows, on page 2.13.

Windows in PTMS will normally take one of two basic formats, **Record** or **Table**. In a record format window, all of the individual pieces of data, referred to as **fields**, are part of one sub-collection of information called a **record**.

# Systems Basics & Conventions

Records and fields are the two ways that information in a **database** are broken down, and PTMS is a database application.

As an example, let us consider a simple database storing the names and addresses of people to whom you send birthday cards. For each person in the database, you will have their name and address, and perhaps other information such as birth date, phone number, presents given in past, etc. All of the information present for one person in the database is the record for that person. Each record is then broken down into individual items of data the record contains, i.e. the fields. There will be separate fields for each data item, such as name, address, city, state, zip, phone, birth date, gifts given, etc. Each set of fields make up a record, all records together are the database.

So in a **Record Format** window, a number of individual fields are displayed that make up a given record. The illustration below is of a record format window.

**ISABELLA CO TRANSPORTATION COMMISSION**

Profile | Application | Vehicles | Equipment | Facilities | Operating Report

Options ▾ Characteristics

**TA Characteristics**

TA Name: ISABELLA CO TRANSPORTATION COMMISSION

Mr. / Ms. ☐ Ms. First: Jan Last: Bauman

Title: General Manager

Contact Name: MS. JAN BAUMAN TA ID: 382161440

Profile: COUNTY-WIDE PUBLIC TRANSIT: SYSTEM OPERATING EVERY DAY EXCEPT MAJOR HOLIDAYS. DEMAND RESPONSE SERVICE IN MT. PLEASANT & ADJACENT AREAS. FLEXIBLE ROUTE SERVICE IN/OUT COUNTY

Address: 4590 E. PICKARD  
MT. PLEASANT, MI 48858

Phone Number: (517) 773-2410 Fax Number: (517) 773-1873

E-Mail: ICTC@ARROWNET.COM

**Legislative Information**

| House Districts | Senate Districts | Legislators            |
|-----------------|------------------|------------------------|
| 99              | 23               | Sen. Joanne Emmons (R) |
|                 |                  | Rep. James McBryde (R) |

Ready 7/17/98 10:11 AM

On the other hand, in a **Table Format** Window, the user will see information concerning a number of records at the same time, each with a number of fields displayed. The table format window is often laid out as a grid, with each row representing a record of information, and each column representing a field in the record. PTMS uses this conversion for table format windows.

# Systems Basics & Conventions

Table format windows have two main purposes. One is comparison of records. By allowing the user to view more than one record simultaneously, it is possible to compare one record against another. The other main use of the table format window is as a navigation tool. By looking at many records simultaneously, the user can locate a desired record for which a more in-depth examination or use is desired.

This use of table format windows as a navigation tool is very important in PTMS, and is covered in depth in the next chapter. A brief discussion will occur here, after the illustration of a table format window.

**State Wide**

**Urban**

☒ Metro ☒ Medium

☒ Large ☒ Small

**Non Urban**

☒ County ☒ Township

☒ City

**Service Types**

☐ Custom

☒ S. Services

☒ Ongoing

☒ New

Apply

Save selected TAs

**Geo Scope**

Geo Scope Change Geo Scope Apply Geo Scope

| Agency ID | Agency Name                        | Address                                    |
|-----------|------------------------------------|--|
| 386004654 | ADRIAN DIAL-A-RIDE                 | 100 E. CHURCH STREET □□ADRIAN, MI 49221    |
| 381914307 | ALLEGAN COUNTY CMH                 | 212 GROVE STREET□□ALLEGAN, MI 49010        |
| 381790220 | ALLEGAN COUNTY RESOURCE DEVELOPM   | 323 WATER STREET□□ALLEGAN, MI 49010        |
| 386004532 | ALMA DIAL-A-RIDE                   | CITY HALL, PO BOX 278□□ALMA, MI 48801-0278 |
| 386004519 | ALPENA, CITY OF                    | 208 NORTH FIRST□□ALPENA, MI 49707          |
| 382922147 | ALTRAN TRANSIT AUTHORITY           | P.O. BOX 69□□MUNISING, MI 49682            |
| 381382621 | AMERICAN RED CROSS OF KENT COUNTY  | 1050 FULLER NE□□GRAND RAPIDS, MI 49503     |
| 382117978 | ANN ARBOR TRANSPORTATION AUTHORITY | 2700 S. INDUSTRIAL HWY.□□ANN ARBOR, MI 481 |
| 386000098 | ANTRIM COUNTY TRANSPORTATION       | P.O. BOX 120□□BELLAIRE, MI 49615           |

Ready 7/17/98 10:15 AM

Note the **table section** at the bottom of the window. Each row corresponds to a record for one Transit Agency. Each column represents a separate field in the record. In this diagram three fields are visible, Agency ID, Agency Name, and Address.

The user will employ a window such as this to locate the record for a desired agency, for which further information or processing is desired. To assist in locating the desired record, the user may employ the horizontal and/or vertical scroll bars that may be present.

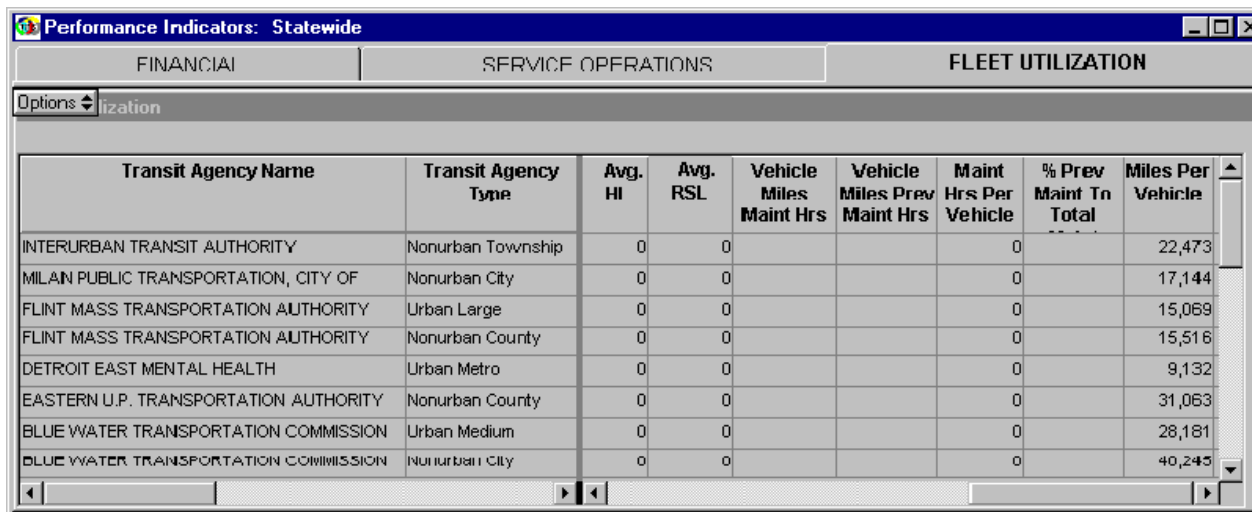
# Systems Basics & Conventions

To review scroll bar use, recall that a user may click on the arrows at the end of the scroll bar to advance the information in the window one row or record at a time; may click on the scroll bar itself to advance the information one page full of records at a time; or may drag the scroll box to control the specific amount of scrolling that takes place.

In PTMS specifically, once the user has located the desired record, the user will then double-click on the desired record to access additional data windows related to the clicked record. This double-click access method is a standard tool in PTMS.

In some table format windows there are so many fields (columns) displayed that a horizontal scroll bar is present. With that many fields, it may be possible that a user will desire to view two fields of the table at the same time, say for comparison purposes, that are so far apart that scrolling one field on scrolls the other field off. To assist in this situation, PTMS provides a split window option, which allows a user to set up two views into the same table. The user can then scroll through all fields in either view, by using the two horizontal scroll bars, allowing any two widely separated fields to be brought together.

To open a split window, the user will point with the mouse to the table section of the window, and click the right mouse button to obtain the shortcut menu. Once the menu is displayed, the user will select the **Split Window** command. As a result of this action, the split window will open, as illustrated below. More information on command selection is provided starting on page 2.15.



The screenshot shows a software window titled "Performance Indicators: Statewide" with three tabs: "FINANCIAL", "SERVICE OPERATIONS", and "FLEET UTILIZATION". The "FLEET UTILIZATION" tab is active. Below the tabs is a table with the following columns: "Transit Agency Name", "Transit Agency Type", "Avg. HI", "Avg. RSL", "Vehicle Miles Maint Hrs", "Vehicle Miles Prev Maint Hrs", "Maint Hrs Per Vehicle", "% Prev Maint To Total", and "Miles Per Vehicle". The table contains eight rows of data for various transit agencies. A horizontal split bar is visible at the bottom of the table, with a small black box in the center for adjusting the split position.

| Transit Agency Name                   | Transit Agency Type | Avg. HI | Avg. RSL | Vehicle Miles Maint Hrs | Vehicle Miles Prev Maint Hrs | Maint Hrs Per Vehicle | % Prev Maint To Total | Miles Per Vehicle |
|---------------------------------------|---------------------|---------|----------|-------------------------|------------------------------|-----------------------|-----------------------|-------------------|
| INTERURBAN TRANSIT AUTHORITY          | Nonurban Township   | 0       | 0        |                         |                              | 0                     |                       | 22,473            |
| MILAN PUBLIC TRANSPORTATION, CITY OF  | Nonurban City       | 0       | 0        |                         |                              | 0                     |                       | 17,144            |
| FLINT MASS TRANSPORTATION AUTHORITY   | Urban Large         | 0       | 0        |                         |                              | 0                     |                       | 15,069            |
| FLINT MASS TRANSPORTATION AUTHORITY   | Nonurban County     | 0       | 0        |                         |                              | 0                     |                       | 15,516            |
| DETROIT EAST METRO                    | Urban Metro         | 0       | 0        |                         |                              | 0                     |                       | 9,132             |
| EASTERN U.P. TRANSPORTATION AUTHORITY | Nonurban County     | 0       | 0        |                         |                              | 0                     |                       | 31,063            |
| BLUE WATER TRANSPORTATION COMMISSION  | Urban Medium        | 0       | 0        |                         |                              | 0                     |                       | 28,181            |
| BLUE WATER TRANSPORTATION COMMISSION  | Nonurban City       | 0       | 0        |                         |                              | 0                     |                       | 40,245            |

The position of the split can be adjusted by dragging the small black box at the bottom of the split bar.

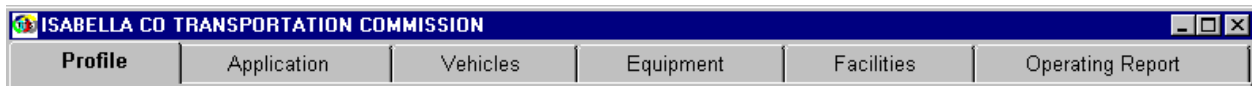
The split can be turned off by closing and reopening the window.

# Systems Basics & Conventions

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## Operation of Layered Windows

PTMS takes advantage of a Windows technology known as layered windows. When this technology is used, a given window in an application may have a number of layers or pages of information, each of which is indicated by a window tab near the top of the layered area. The active layer is the one currently visible to the user, and is indicated by the window tab in boldface type. To make another layer active, the user can point to the desired window tab with the mouse pointer and click on it. Window tabs are illustrated below.



By using window layers, an application can present information in one window that would otherwise have taken many separate windows to display. The disadvantages of multiple windows include the time and effort used in opening and closing the multiple windows, and the fact that if multiple windows are opened simultaneously, it taxes the capacity and resources of the computer system in use. The advantages of layered windows include rapid access (one click) to multiple pages of information, less pressure on the system in question, and most important, the ability to relate the information contained within the layers.

As the user will see in PTMS, the selection of a record in one window will then determine the field contents in many other layers. This allows one retrieval by the user to populate pages of related fields. The use of layered windows substantially improves the ease-of-use, efficiency, and productivity of an application.

# Systems Basics & Conventions

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## Active Record/Active Field

When using a database application, it is important to understand the concepts of active record and active field.

When a user accesses database information, or makes changes to a database, the information retrieved and the changes made will directly depend upon and affect the active field, and the active record. If the user is unaware of which field and/or record is active, the user may not be obtaining the information desired, or may be changing the wrong information, creating errors in the database.

How to identify which record and field is active depends upon whether the user is in a record format or table format window. In a record format window, only one record of information is displayed at a time. Therefore whichever record is displayed is the one that is active. Which field is active is indicated by the presence of a blinking insertion point within the field, or the presence of a selection rectangle around the field or the field name. The user can make another field active by clicking it, or tabbing to it.

In a table format window, the active record is the row that has a highlighting color on it. The active field may have an insertion point in the field, or a highlighting of a different color. The user can change the active record and field by clicking in the desired locations, or by employing the arrow or tab keys to move the highlighting.

Verifying that the active record and field are correct is a very important first step in many database operations.

# Systems Basics & Conventions

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## Command Selection

As in most Windows-based applications, there are a number of different ways in which commands can be selected in the PTMS application. This section will review methods for command selection available so that the PTMS user can choose the method or methods most appropriate.

### Menu/Mouse Method

One of the more popular methods of command selection is to use the mouse in conjunction with the pull-down menus available on the Menu Bar. The user simply uses the mouse to point to the desired menu selection, such as **File**, and then clicks the left mouse button. The pull-down menu will open up, and then the user points to the desired menu option on the pull-down list, and again clicks the left mouse button.

If a user wishes to close a pull-down menu without making a command selection, the user can point to an area outside of the pull-down menu and click the left mouse button to close the menu.

### Tool Bar Mouse Method

The Tool Bar, found immediately below the Menu Bar, makes frequently used commands more readily accessible to the user. Instead of having to click on a particular pull-down menu, and then on a menu option on the pull-down menu, a user simply points to and clicks on the appropriate Tool Bar button. Note that not all PTMS commands are available on the Tool Bar.

### Menu/Keyboard Method

A user may prefer to select commands via the keyboard rather than the mouse. To activate a pull-down menu on the Menu Bar via the keyboard, the user will press the **ALT** key on the keyboard in conjunction with the letter underlined in the pull-down menu name. For example, to activate the **File** pull-down menu, the user will press **ALT** and **F** together, since **F** is the letter underlined in **File**. Alternatively, the user may press just the **ALT** key to activate the Menu Bar, then use the left/right arrow keys to move the highlighting to the desired pull-down menu, and then use the up/down arrow keys, or press **ENTER**, to open the pull-down menu.

Once the pull-down menu is open, the user has two alternatives for selecting the desired command. One, the user may use the up and down arrow keys to move the highlighting to the desired command, and then press **ENTER** to activate the command. Two, the user may simply type the letter underlined in the desired command. Note that when making the selection from the open pull-down menu, the **ALT** key is **NOT** used. The user presses **ONLY** the underlined letter. If no letter is underlined in the desired command, usually the initial letter of the command is appropriate.

# Systems Basics & Conventions

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If a user wishes to leave the menu system without making a command selection, the user may press the **ESC** key as often as required to return to the application.

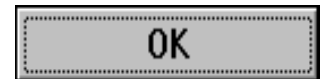
## Command Button Method

In many windows the user can make command selections through the use of command buttons, such as the **OK** button illustrated at the right.



A user may activate a command button in any one of three ways:

1. To activate a command button, a user can point to the button with the mouse and then click the left mouse button.
2. If there is a letter underlined in the command word on the button the user can activate the command button by pressing the ALT key in combination with the underlined letter.
3. In certain windows the user can press the **TAB key or the SHIFT TAB** key combination until the command button is selected, indicated by a rectangle surrounding the command word, as illustrated at the right, and then press the ENTER key.



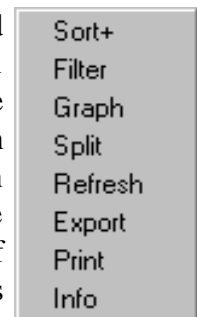
## Menu Button

PTMS has a special type of command button that displays a menu when it is selected. Such a button is distinguished by up/down arrowheads at the right end of the button. Once the command button is selected, and the menu is displayed, the user can select a menu option via either the keyboard or mouse as discussed earlier. The **Options** button that often appears below the left end of the lower title bar is such a button, and is illustrated at the right.



## Shortcut Menu

A shortcut Menu is one that is displayed when the right mouse button is clicked while pointing to a section of an active window. The exact menu displayed will depend upon the location of the mouse pointer at the time that the right mouse button is pushed. When a shortcut menu is displayed, the user can select an option from the menu via the keyboard or mouse as discussed earlier. Shortcut menus can improve efficiency and productivity as the user does not have to search through the menu system for the desired commands. The shortcut menu pulls together most of the commands appropriate at the moment. One of the more complete shortcut menus is illustrated at the right.



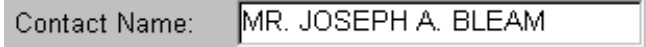
# Systems Basics & Conventions

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## Data Entry Tools

PTMS uses a number of different data entry tools to provide the user efficient and accurate data entry. Note that editable fields in a given window will depend upon the authorization of the user. Editable fields will normally display in white, non-editable fields in gray.

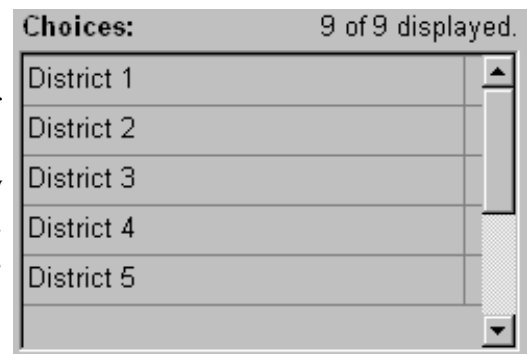
### Text Box

A screenshot of a text box interface. On the left, the label "Contact Name:" is displayed in a gray background. To its right is a white rectangular text box containing the text "MR. JOSEPH A. BLEAM".

The Text Box is the simplest of the data entry tools. To use a text box, the user simply makes the desired text box active, getting a blinking insertion point, and then types in the desired information. A given text box may hold only a few characters, or hundreds. Some of the text boxes that expect long contents have a vertical scroll bar attached. As you type, some text boxes will automatically scroll horizontally, and some may wrap around at the end. Many standard word-processing techniques and keystrokes are available in text boxes, such as selecting, cut & paste, **HOME** and **END**.

### List Box

A List Box is a rectangular box containing a list of acceptable values for a given field. A list box saves typing by the user by allowing a user to fill a data field simply by making a selection from the list provided with the list box. This process also provides for consistent data values within PTMS.



There are two ways a user can work with a list box.

The user locates and clicks on the desired value, utilizing a scroll bar if present and necessary.

The user can make the list field the active field and then use the up/down keys to scroll through the list of available choices. To speed up this process, the user can type the first letter of the desired value and the list will jump to the choices in that section for the alphabet, reducing the amount of scrolling required.

# Systems Basics & Conventions

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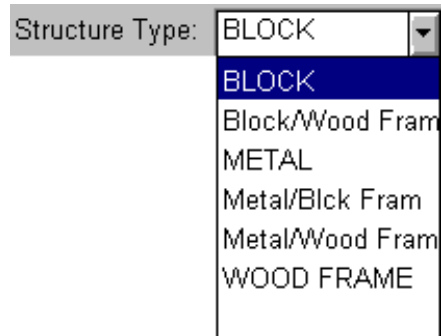
## Picklist Box

A screenshot of a picklist box labeled "Structure Type:". The box contains the text "BLOCK" and a small downward-pointing arrow on the right side.

A picklist Box is distinguished by the small down-pointing arrow at the right end of the box, such as in the example shown at the right. Note that in many picking fields in PTMS, the picklist arrow does not appear until the field is active. A picklist box saves typing by the user by allowing a user to fill a data field simply by making a selection from the list provided with the picklist box. This process also provides for consistent data values within PTMS.

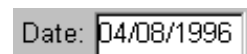
There are two ways a user can work with a picklist box.

The user can simply use the mouse to click on the down arrow at the end of the box, or anywhere in the data area, to open up the picklist. Once the picklist is open, the user locates and clicks on the desired value. The illustration at the right shows an open picklist.

A screenshot of the "Structure Type:" picklist box with the list open. The list contains the following items: "BLOCK" (highlighted in blue), "Block/Wood Fram", "METAL", "Metal/Blck Fram", "Metal/Wood Fram", and "WOOD FRAME".

The user can make the picklist field the active field and then use the up/down arrow keys to scroll through the list of available choices. To speed up this process, the user can type the first letter of the desired value and the list will jump to the choices in that section of the alphabet, reducing the amount of scrolling required.

## Date Box

A screenshot of a date box labeled "Date:". The box contains the text "04/08/1996".

A Date Box is a specialized text box that allows only dates to be entered. One advantage of having a date box for data entry is that the user needs only to type the six digits of the date, without typing dividers, delimiters, spaces, or tabs. Another advantage is built-in date validation. PTMS will not allow a user to enter a non-existent date, such as 11/31/1995, or 2/29/1995. However, an appropriate leap day, such as 2/29/1996 is allowed. Some date boxes contain the year only, such as 1995.

# Systems Basics & Conventions

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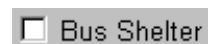
## Option Group

The Option Group tool is used where there is a short list of acceptable entries for a data field. The option group appears in a window as a subsection of a window, usually surrounded by a line, and labeled with the name of the field to which the group is connected. A number of possible field values will appear in the group, each normally preceded by a small circle filled with white. These small circles are referred to as **Radio Buttons**. The radio button of the activity choice will be filled with a small black dot. A distinguishing feature of option groups is that the possible field values are mutually exclusive. Clicking on any given value will place the black dot in front of that value. Selecting a different value will move the dot to the new selection. Only one value can be selected at any time.



## Check Box

The Check Box tool is used in conjunction with fields (often called logical fields) for which the only acceptable entries are Yes (True) or No (False). In a data window a check box field normally appears as a small square box filled with white, followed by a field name or description. The user can select/deselect the check box (place or remove an **x** in the box) either by clicking in the box or on the field name/description with the mouse, or pressing the **[SPACE BAR]** Key on the keyboard when the field is active. When there is an **x** in the box, the value stored in the database for the corresponding field is Yes or True. When the box is empty, the value stored in the database for the corresponding field is No or False.



## Miscellaneous Operations

PTMS has a number of standard file and window type operations that can be performed. Selected operations are discussed in this section.

### Saving

Data changes made by the user in a given window should be saved by the user prior to closing the window. If the user forgets to save first, the system will prompt the user to save changes. The user can access the save command in a number of ways, with availability depending upon the active window: through the **File** pull-down menu; through the **Options** command menu button; through the shortcut menu (right mouse button) options; or through the Save command button at the bottom of certain data windows.

# Systems Basics & Conventions

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## Errors

If you get an **error message** at any time, you must click on the **OK** button in the error message before you are allowed to do anything else. You may also see an error box in the top right-hand corner of your screen if you try to save a screen without entering certain required information. You will have to double click on the control menu box of this error message (left end of title bar), and enter the required information, before you can continue.

## Exporting

PTMS provides the user the ability to export PTMS data to standard file formats. When available, usually in table form windows, this function can be accessed through the shortcut (right mouse button) menu. The user will display the shortcut menu, and then select the **Export** command. As a result of this action the **Export Datawindow** window is opened, as illustrated below.

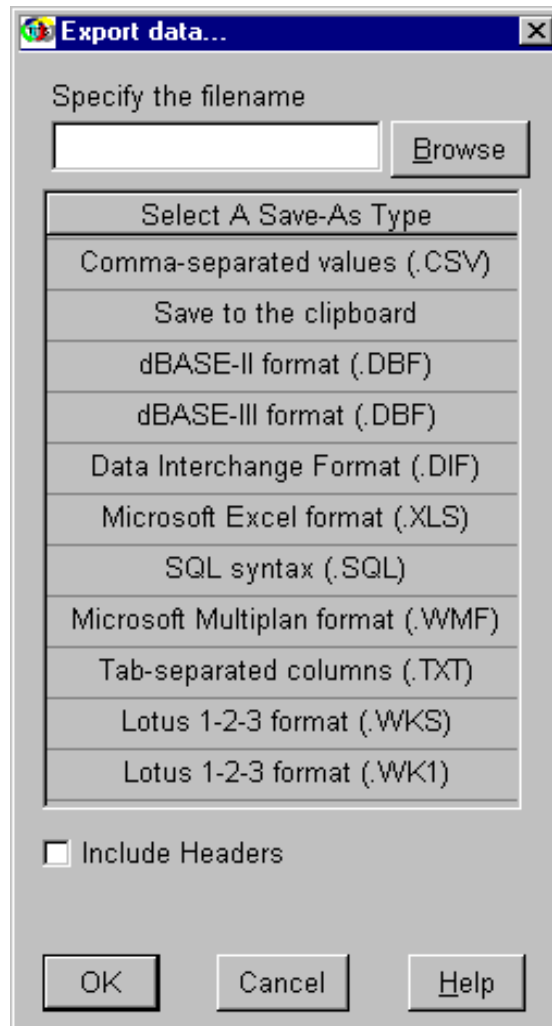


To export to one of the two indicated file types, the user will make the desired selection in the Export Type option group, enter the file name to export to in the **Export Filename** field, indicate whether to **Include Headers**, and then click on **Export**.

# Systems Basics & Conventions

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If the user wishes to export to a different file type than the two options given, the user will click on **Export Special** to open the **Export Data** window illustrated below.



The user will now select the desired file type, enter the file name to export to, indicate whether to include headers, and then click **OK**.

# Systems Basics & Conventions

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## Printing

The PTMS user can access the Print command through various means depending on the active window. Possible access methods include the shortcut (right mouse button) menu options, the Print command under the File menu, and a Print command button present in the window. The result of the print command will depend upon the position of the mouse pointer and/or the active field at the time the print command is issued.

If a field in a form is active at the time the print command is issued, only the form containing the active field will be printed. If no field is active, the print command will print the window to which the mouse is pointing when the print command is issued.

The Print command button in the OAR window activates a report menu. See page 5.27.

## Closing

When through with a given window the user will close the window to return to the previous window. The user can close a window by selecting the close button at the right of the lower title bar, or by double-clicking the control menu box at the left end of the title bar that looks like the TMS startup icon.

## Help

Available in most screens is **Bubble Help**. Bubble help is accessed by holding down the ALT key and the right mouse button while you are in a specific data field. By using this combination of keystrokes, a yellow box should appear that will provide limited information about the data in that field, or will say “no help available”. This option is not available in the OAR area as of this writing.

Additional help is under development as of this writing, which will be available various ways depending on the active window. Possible access methods include through the **H**elp command on the menu Bar, under the Options command menu button, and through shortcut (right mouse button) menus.

## Exiting PTMS

When through with PTMS, the user can close the application by selecting the **E**xit command under the **F**ile pull-down menu, selecting the Close button at the right end of the main title bar, or double clicking the control menu box that looks like the TMS start-up icon at the left end of the main title bar.

After exiting PTMS, the user will need to hang-up the modem. Double Click on the **D**ial-Up **N**etworking icon, and then click on the **H**ang-up button in the active window.

## **Transit Agency - Record Retrieval**

Last Chapter Update: 12/8/98

# Transit Agency - Record Retrieval

## Overview

One of the major functions of the PTMS application is to allow users to create, edit, and view information concerning Transit Agencies, such as profile, and application data, checklist information, capital and operating request data, and information relating to vehicles, equipment, facilities, and operating assistance reports.

To work with any of this information for a given agency, it is first necessary to specify to PTMS the agency for which such information is desired. That is the purpose of this chapter, to learn how to locate and select a desired transit agency record for further processing.

To View information for a given transit agency, the user will begin by starting PTMS, as discussed on page 2.3. If the **Public Transportation Gateway** window is presented, the user will select the Statewide Transit Agency List option in the Select a Public Transit Process option group, and then click on the **OK** button. If the Gateway is not presented, the user will select **File/Open/TA** from the menu bar.

Either approach will cause the **Open TA** window to be displayed, as illustrated below.

The 'Open TA' window is a standard Windows-style application window. It features a title bar with the text 'Open TA'. The main content area is divided into several sections. At the top, there are two tabs: 'State Wide' and 'Non Urban'. The 'State Wide' tab is selected. Below this, there are two groups of checkboxes. The first group, labeled 'Urban', includes 'Metro', 'Medium', 'Large', and 'Small'. The second group, labeled 'Non Urban', includes 'County', 'Township', and 'City'. To the right of these groups is a 'Service Types' section with checkboxes for 'S. Services', 'Ongoing', and 'New'. Further right is a 'Custom' checkbox and an 'Apply' button. Below the 'Apply' button is a 'Save selected TAs' button. Below these sections is a 'Geo Scope' section with a 'Geo Scope' button, a 'Change Geo Scope' button, and an 'Apply Geo Scope' button. At the bottom of the window is a table with three columns: 'Agency ID', 'Agency Name', and 'Address'. The table contains ten rows of data. The status bar at the bottom of the window shows 'Ready' on the left and '7/20/98 8:11 AM' on the right.

| Agency ID | Agency Name                        | Address                                    |
|-----------|------------------------------------|--|
| 386004654 | ADRIAN DIAL-A-RIDE                 | 100 E. CHURCH STREET □□ADRIAN, MI 49221    |
| 381914307 | ALLEGAN COUNTY CMH                 | 212 GROVE STREET□□ALLEGAN, MI 49010        |
| 381790220 | ALLEGAN COUNTY RESOURCE DEVELOPM   | 323 WATER STREET□□ALLEGAN, MI 49010        |
| 386004532 | ALMA DIAL-A-RIDE                   | CITY HALL, PO BOX 278□□ALMA, MI 48801-0278 |
| 386004519 | ALPENA, CITY OF                    | 208 NORTH FIRST□□ALPENA, MI 49707          |
| 382922147 | ALTRAN TRANSIT AUTHORITY           | P.O. BOX 69□□MUNISING, MI 49682            |
| 381382621 | AMERICAN RED CROSS OF KENT COUNTY  | 1050 FULLER NE□□GRAND RAPIDS, MI 49503     |
| 382117978 | ANN ARBOR TRANSPORTATION AUTHORITY | 2700 S. INDUSTRIAL HWY.□□ANN ARBOR, MI 481 |
| 386000098 | ANTRIM COUNTY TRANSPORTATION       | P.O. BOX 120□□BELLAIRE, MI 49615           |

# Transit Agency - Record Retrieval

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The lowest section of the window is in table format, with multiple rows and columns. Each row represents one transit agency, and each column represents one field of information within the record. To access information on a given transit agency, the user will need to locate and select the desired record in this table. The user can use the vertical scroll bar provided to move through the list of records.

Since there may be a large number of records to examine, PTMS provides a number of functions to assist the user in locating the desired record. The use of these functions will be covered in the remainder of the chapter. **Note** that if the **Custom** check box is selected, it must be unmarked before changes can be made.

# Transit Agency - Record Retrieval

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## Filtering

Filtering is the process of specifying certain criteria that the transit agency records need to match in order to be displayed in the list at the bottom of the **Open TA** window. By filtering the list of agencies, fewer agencies will appear in the list. With fewer agencies in the list, the user will be able to locate the desired record with less effort.

The top of the **Open TA** window is where the filtering options are located. The **State Wide/Urban/Non Urban** sections and the **Service Types** section are where criteria are indicated as check box fields.

The presence of a mark in a check box indicates that the table section of the window will display transit agency records meeting that criteria. Note in the diagram on the previous page that all the boxes are checked, so records of all types will be retrieved. Removing a mark from a check box will cause transit agency records of that type not to be displayed. For example, if the mark was removed from the **Metro** box, then Urban/Metro transit agencies will not be displayed in the list.

The user may remove or add a mark to a check box by clicking in the box, or on the field name associated with the box. So to remove the mark in the **Metro** box, the user will click in that box, or on the word **Metro**. The same action will place a mark in an empty box. To remove or add whole groups, the user can click on the section label names, which are also command buttons. By clicking on **State Wide**, marks will be removed or added to all check boxes in the **Urban** and **Non Urban** sections. The user can also click on **Urban** or **Non Urban** to add or remove all marks in those sections respectively. There is no button for the **Service Types** section, each mark must be removed or added individually.

Once all changes in marked boxes have been made, the user will need to click on the **Apply** button at the right of the top section of the **Open TA** window. This action causes PTMS to refresh the list of displayed transit agency records so that only the ones meeting the marked criteria are displayed. By removing or adding marks as appropriate, the user can restrict the displayed agencies to a smaller list that will be easier to search.

## Custom Filter Set

In certain cases a PTMS user may desire to view only a very particular set of transit agency records that the filtering process discussed above does not produce. PTMS allows users to build and store a custom filter record set that contains only the exact records specified by the user.

Creating such a custom set requires a two-step process. The first step is selecting the specific records to be in the set, and the second step is saving the selected set.

# Transit Agency - Record Retrieval

To select the records to be in the custom set, the user will need to access the record list as discussed in the preceding sections of this chapter. The user may or may not desire to filter the list first as discussed in the section on the previous page. Once the list contains all the records to be in the custom set (along with many that will not), the user will need to scroll through the list and click in the row of each record that is to be in the custom set. Each row so selected will be highlighted in another color. The diagram below shows records marked to be a custom set.

The screenshot shows the 'Open TA' window with various filters and a list of transit agencies. The 'State Wide' filter is active, with 'Urban' and 'Non Urban' sub-filters. The 'Service Types' section has 'S. Services', 'Ongoing', and 'New' checked. The 'Custom' checkbox is checked. The 'Geo Scope' section has 'Geo Scope', 'Change Geo Scope', and 'Apply Geo Scope' buttons. The list of agencies is as follows:

| Agency ID | Agency Name                        | Address                                    |
|-----------|------------------------------------|--|
| 386004654 | ADRIAN DIAL-A-RIDE                 | 100 E. CHURCH STREET □□ADRIAN, MI 49221    |
| 381914307 | ALLEGAN COUNTY CMH                 | 212 GROVE STREET□□ALLEGAN, MI 49010        |
| 381790220 | ALLEGAN COUNTY RESOURCE DEVELOPM   | 323 WATER STREET□□ALLEGAN, MI 49010        |
| 386004532 | ALMA DIAL-A-RIDE                   | CITY HALL, PO BOX 278□□ALMA, MI 48801-0278 |
| 386004519 | ALPENA, CITY OF                    | 208 NORTH FIRST□□ALPENA, MI 49707          |
| 382922147 | ALTRAN TRANSIT AUTHORITY           | P.O. BOX 69□□MUNISING, MI 49682            |
| 381382621 | AMERICAN RED CROSS OF KENT COUNTY  | 1050 FULLER NE□□GRAND RAPIDS, MI 49503     |
| 382117978 | ANN ARBOR TRANSPORTATION AUTHORITY | 2700 S. INDUSTRIAL HWY.□□ANN ARBOR, MI 481 |
| 386000098 | ANTRIM COUNTY TRANSPORTATION       | P.O. BOX 120□□BELLAIRE, MI 49615           |

If the user clicks in and marks a wrong record (row) accidentally, the user can simply click it again to unmark the row.

Once the records to be in the custom set are all marked correctly, the user will click on the **Save selected TAs** button to store and display the custom set.

Note that when the custom set is displayed, there is a mark in the **Custom** check box at the upper right of the **Open TA** window. By removing the mark in the **Custom** box, the custom set will be temporarily turned off, and PTMS will display records meeting the other specified criteria as discussed earlier in this chapter.

Also note that if the user has saved a custom filter set, that PTMS will automatically display this set every time the **Open TA** window is initially opened.

# Transit Agency - Record Retrieval

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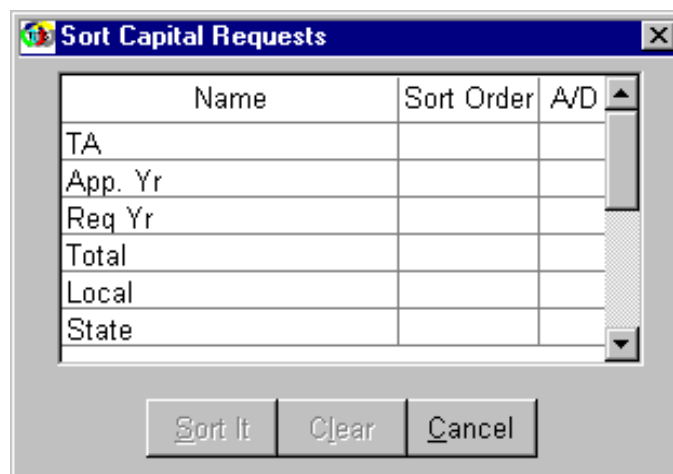
## Sorting

Even after filtering the transit agency records, there may still be a large number of records through which the user must search to locate the transit agency record for which further processing is desired. To assist in this search, PTMS provides the user the ability to sort the list of records by any displayed field, or by multiple fields. Sorting the records in a certain order may assist the user in quickly locating the desired record.

To sort the table section of the **Open TA** window on one of the displayed fields, the user will begin by right-clicking anywhere in the column representing the field by which the table will be sorted. Then while pointing the mouse at the menu that pops up the user will select the **Sort** command. As a result of this action the table will sort in ascending order by the selected column (field). To sort in descending order, the user will simply perform the identical operation again.

Note that any sorting performed is in effect only while the **Open TA** window is open. Once the window is closed and reopened, the sort order will revert to its default setting.

An option **not available** in the Open TA window, but that is available in certain other PTMS windows having a table format, is the ability to sort by more than one field. This is called **Sort+**. To perform this multi-field sort, the user will display the shortcut menu as discussed earlier, and then select the **Sort+** command. As a result of this action a **Sort** window similar to the one illustrated below is opened. The actual contents of the window will depend upon the table window for which it is opened. This example is based on the Capital Request window.

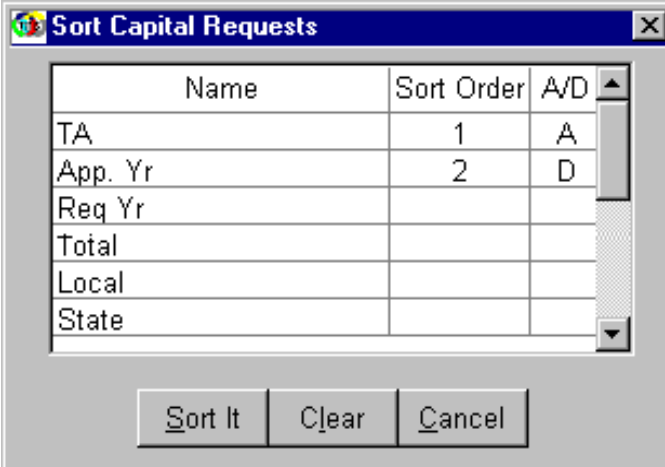


In the **Name** column will be the names of fields by which the table can be sorted. The **Sort Order** column indicates the priority sort order of the multiple sort fields selected. The **A/D** column indicates whether the sort order is to be ascending or descending for selected sort fields.

# Transit Agency - Record Retrieval

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To select a field to sort by, the user simply clicks in the **Sort Order** column of the desired field. The first row clicked in becomes the number 1 priority sort field, the second 2, and so on. Each sort field selected is set to ascending (A) by default, but by clicking in the **A/D** column, the user can change the A to D (descending). The diagram below illustrates a two key sort on TA and App. Yr. TA is the primary sort key, and App. Yr second. TA will sort ascending, and App. Yr descending.



| Name    | Sort Order | A/D |
|---------|------------|-----|
| TA      | 1          | A   |
| App. Yr | 2          | D   |
| Req Yr  |            |     |
| Total   |            |     |
| Local   |            |     |
| State   |            |     |

Sort It   Clear   Cancel

When the sort keys are set up as desired, the user will click on the **Sort It** button to close this window and have the table sorted as desired. The **Clear** button cleans out all currently indicated sort key information. The **Cancel** button closes this window without performing any sort indicated.

# Transit Agency - Record Retrieval

## Geo Scope

In addition to the filtering mechanism discussed starting on page 3.4, PTMS has an advanced filtering mechanism called Geo Scope. This mechanism allows users to filter transit agency records based on geographic area. To access the window where geographic filtering criteria can be specified, the user will click on the **Geo Scope** button at the left of the **Open TA** window, under the **State Wide/Urban** filter section. As a result of this action the **Geography** window is opened, as illustrated below, with the **Areas** layer active. The **Map** layer is not available as of this writing, and use of the two Network layers is outside the scope of this manual.

The screenshot shows the 'Geography' window with the 'Areas' tab selected. The 'Options' section shows 'Select Portion of State' is chosen. The 'Category' list box has 'District' selected. The 'Choices' list box shows a list of districts from 1 to 6. The 'Buffer Zone (Survey Feet):' and 'Jump To:' text boxes are empty. The 'Selected criteria being applied' text box is also empty. The 'OK' and 'Clear' buttons are at the bottom right.

In the option group at the upper left of the **Geography** window, the default choice is **Select Portion of State**, which allows the user to specify a geographic criteria upon which the filtering of transit agency records is to be based. The user may choose **Select Entire State** if desired to include agencies from the whole state. This action will automatically build a filter criteria to include all Districts in the State.

If **Select Portion of State** is chosen, then the **Category** list box will display a number of options that geographically delimit a section of the State, such as District, County, Township, City. The user will begin setting up a geographic criteria by making one selection in the Category list box.

# Transit Agency - Record Retrieval

The selection made in the Category box will determine the contents of the **Choices** list box displayed to the right of the category box. In the illustration on the preceding page, District is chosen in the Category box, so the number Districts are listed in the Choices box. The user may now select one item in the Choices box to complete a filter criteria. The completed criteria will be displayed in the **Selected criteria being applied** box at the lower left of the window. In the illustration below, note how the choice of District in the Category box and District 1 in the Choices box is translated in the criteria box.

The screenshot shows a software window titled "Geography" with four tabs: "Map", "Areas", "Road Networks", and "Forecasted Network". The "Areas" tab is active. Below the tabs is a "Options" dropdown menu set to "This Area". On the left, there are two radio buttons: "Select Entire State" (unselected) and "Select Portion of State" (selected). Below these is a "Category:" list box with "District" selected. To the right of the "Category:" list box is a "Not" checkbox (unchecked). To the right of the "Not" checkbox is a "Choices:" list box showing "9 of 9 displayed" items: "District 1", "District 2", "District 3", "District 4", "District 5", and "District 6". "District 1" is selected in the "Choices:" list box. Below the "Category:" list box is a "Buffer Zone (Survey Feet):" text box. Below the "Choices:" list box is a "Jump To:" text box. At the bottom left is a "Selected criteria being applied" text box containing "( District is District 1 )". At the bottom right are "OK" and "Clear" buttons. To the right of the "Choices:" list box is a message: "You must choose an operator before selecting another category" with "And" and "Or" radio buttons.

Also note the **And** and **Or** buttons to the right of the Choices box that are now displayed. These choices are used to create a multi-condition criteria. To add another clause to the filter condition, the user would pick from **And/Or** as appropriate, then make additional selections in the Category and Choices boxes.

There are a few other choices in this window that need to be discussed.

**Not Check Box** – Notice the Not check box between the Category and Choices list boxes. The user will select this box to create a Not condition in the filter criteria. For example suppose the user had selected District in the Category box, selected the Not check box, and selected the District 1 choice in the Choices box. Then the criteria would be District Not = District 1, so instead of receiving transit agency records from **only** District 1, this criteria would retrieve records from everywhere except District 1.

# Transit Agency - Record Retrieval

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**Jump To Text Box** – This box is used in conjunction with the Choices box to speed up selection in the Choices box. If there are many entries in the Choices box, instead of having to use the vertical scroll bar to locate the desired choice, the user can type it in the Jump To box to have the Choice box jump to that selection.

**Buffer Zone (meters) Text Box** – This text box allows the user to enter a numeric value representing a number of meters of buffer zone that will be part of the filter criteria. This field is only applicable to appropriate Categories.

**Clear Button** – This button cleans out any criteria in the **Selected criteria being applied** box, allowing for fresh criteria entry.

**Save this scope as default Check Box** – By selecting this check box, the user indicates that the currently constructed geographic filter criteria is to be the default filter criteria used in the **Open TA** window.

Once the desired geographic filter criteria has been built, the user will need to return to the **Open TA** window to apply the filter. The user will click the **OK** button at the bottom of the window.

Once back in the **Open TA** window, click on the **Apply Geo Scope** button. PTMS will refresh the list of displayed transit agency records to those meeting the geographic criteria.

To return to the Geography window and edit the geographic criteria, the user can click on the **Change Geo Scope** button.

Criteria developed through Geo Scope are in effect while the **Open TA** window is open. Closing and reopening the window will remove the active geographic filter criteria.

## Further Processing

Once the filtering and sorting methods have been used, the user may still need to scroll to locate the desired transit agency record row in the bottom section of the **Open TA** window. When the desired record is finally located, the user will point to that record with the mouse and double-click on it to open the **Transit** window for the selected agency. The first layer of that window, the **Profile** layer, is covered starting in the next chapter.

## **Transit Agency - Profile**

Last Chapter Update: 12/8/98

# Transit Agency - Profile

## Overview

This chapter will cover the profile information contained in PTMS for each Transit Agency, including general characteristics, service characteristics, and contract information.

## Accessing Profile Information

To access transit agency profile information, the user must first start PTMS as discussed starting on page 2.3. Then the user must locate the record for the transit agency for which profile information is desired, as discussed starting on page 3.2. Once the correct record is located, the user will point to and double-click on the desired agency in the **Open TA** window. As a result of this action the **Transit** window opens for the selected agency. Note that in the illustration below, it is the **ISABELLA CO TRANSPORTATION COMMISSION** window.

The screenshot shows a software window titled "ISABELLA CO TRANSPORTATION COMMISSION". It has a menu bar with "Profile", "Application", "Vehicles", "Equipment", "Facilities", and "Operating Report". Below the menu bar is a tab labeled "Options" and a section titled "Characteristics".

The "TA Characteristics" section contains the following fields:

- TA Name: ISABELLA CO TRANSPORTATION COMMISSION
- Mr. / Ms.: Ms. First: Jan Last: Bauman
- Title: General Manager
- Contact Name: MS. JAN BAUMAN TA ID: 382161440
- Profile: COUNTY-WIDE PUBLIC TRANSIT: SYSTEM OPERATING EVERY DAY EXCEPT MAJOR HOLIDAYS. DEMAND RESPONSE SERVICE IN MT. PLEASANT & ADJACENT AREAS. FLEXIBLE ROUTE SERVICE IN OUT COUNTY
- Address: 4590 E. PICKARD MT. PLEASANT, MI 48858
- Phone Number: (517) 773-2410 Fax Number: (517) 773-1873
- E-Mail: ICTC@ARROWNET.COM

The "Legislative Information" section contains three tables:

| House Districts |
|-----------------|
| 99              |

| Senate Districts |
|------------------|
| 23               |

| Legislators            |
|------------------------|
| Sen. Joanne Emmons (R) |
| Rep. James McBryde (R) |

The status bar at the bottom shows "Ready" on the left and "7/20/98 8:47 AM" on the right.

Note also that the **Profile** layer is active in this six layer window. By pointing to any of the lists in the Legislative Information section and clicking, the user can access a window providing related information. As of this writing this feature is under development and clicking will result in a message indicating so. Click OK in the message window, and then click on Cancel in the Gateway window to return to the Profile layer.

# Transit Agency - Profile

## Profile – General Characteristics

There are two pages of information associated with the Profile layer, one for General Characteristics and one for Service Characteristics. When the Agency Transit/ Profile layer is initially displayed, the general Characteristics page is displayed, as illustrated below.

The screenshot shows a software window titled "ISABELLA CO TRANSPORTATION COMMISSION". It has a menu bar with "Profile", "Application", "Vehicles", "Equipment", "Facilities", and "Operating Report". Below the menu bar is a tabbed interface with "Options" and "Characteristics" tabs. The "Characteristics" tab is active, showing two sections: "TA Characteristics" and "Legislative Information".

**TA Characteristics**

|               |  |             |                |
|---------------|--|-------------|----------------|
| TA Name:      | ISABELLA CO TRANSPORTATION COMMISSION  |             |                |
| Mr. / Ms.     | Ms.  | First: Jan  | Last: Bauman   |
| Title:        | General Manager  |             |                |
| Contact Name: | MS. JAN BAUMAN   | TA ID:      | 382161440      |
| Profile:      | COUNTY-WIDE PUBLIC TRANSIT: SYSTEM OPERATING EVERY DAY EXCEPT MAJOR HOLIDAYS. DEMAND RESPONSE SERVICE IN MT. PLEASANT & ADJACENT AREAS. FLEXIBLE ROUTE SERVICE IN OUT COUNTY |             |                |
| Address:      | 4590 E. PICKARD<br>MT. PLEASANT, MI 48858  |             |                |
| Phone Number: | (517) 773-2410   | Fax Number: | (517) 773-1873 |
| E-Mail:       | ICTC@ARROWNET.COM  |             |                |

**Legislative Information**

| House Districts | Senate Districts | Legislators            |
|-----------------|------------------|------------------------|
| 99              | 23               | Sen. Joanne Emmons (R) |
|                 |                  | Rep. James McBryde (R) |

The status bar at the bottom shows "Ready" on the left and "12/3/98 9:09 AM" on the right.

This is a record format window, with a number of text box fields. Recall that editable fields are in white, and non-editable fields in gray. Also recall that whether a field is editable or not will depend upon the authorization of the PTMS user. So the illustration on the previous page may have a different configuration of editable and non-editable fields than your working system. The transit agency should keep all editable fields up-to-date.

This screen is used to store general information concerning the selected transit agency.

# Transit Agency - Profile

## Profile Service Characteristics

Once the user has accessed the Profile – General Characteristics window discussed on the previous page, the user can then use the Options command menu button to access the Service Characteristics page. The user will click on the **Options** command menu button, and then click on **Service Characteristics**. As a result of this action the Profile –Service Characteristics page is displayed, as illustrated below.

| ISABELLA CO TRANSPORTATION COMMISSION |             |          |                    |            |                  |
|---------------------------------------|-------------|----------|--------------------|------------|------------------|
| Profile                               | Application | Vehicles | Equipment          | Facilities | Operating Report |
| Options - Information - Budgeted      |             |          |                    |            |                  |
| 9/30/1997<br>Year Ending:             |             |          |                    |            |                  |
| <b>Service Information</b>            |             |          | <b>Funding</b>     |            |                  |
| Total Miles:                          | 621,000     |          | Total Expenditure: | 1,610,900  |                  |
| Total Passengers:                     | 248,000     |          | Federal (%):       | 0          |                  |
| Total Vehicle Hours:                  | 44,200      |          | State (%):         | 0          |                  |
| Total Buses:                          | 30          |          | Local (%):         | 0          |                  |
| Total Lift Buses:                     | 25          |          |                    |            |                  |
| Total Employees (FTE's)               |             |          |                    |            |                  |
| Total Population Served:              | 54,624      |          |                    |            |                  |

Ready 7/20/98 9:06 AM

By default information will be displayed for the current fiscal year, as indicated in the Year Ending field. The user may employ the picklist provided to select another fiscal year as desired.

## **Transit Agency – Application**

Last Chapter Update: 12/8/98

# Transit Agency - Application

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## Overview

This chapter will focus on the use of the **Application** layer in the Transit Agency window. The Application layer was designed to replace the paper Annual Application that the Transit Agencies currently use. It is organized a little differently than the current application, but it is a step in the right direction, getting away from all the paper currently used, and making the application process easier.

This manual focuses on the PTMS application process. For additional assistance completing the application, please refer to application instructions mailed to you, or contact your Project Manager.

## Accessing Application Information

To access transit agency profile information, the user must first start PTMS as discussed starting on page 2.3. Then the user must locate the record for the transit agency for which profile information is desired, as discussed starting on page 3.2. Once the correct record is located, the user will point to and double-click on the desired agency in the **Open TA** window. As a result of this action the **Transit** window opens for the selected agency. Note that in the illustration below, it is the **ISABELLA CO TRANSPORTATION COMMISSION** window.

# Transit Agency - Application

| ISABELLA CO TRANSPORTATION COMMISSION |             |          |           |            |                  |
|---------------------------------------|-------------|----------|-----------|------------|------------------|
| Profile                               | Application | Vehicles | Equipment | Facilities | Operating Report |

Options ▾ Characteristics

**TA Characteristics**

TA Name: ISABELLA CO TRANSPORTATION COMMISSION

Mr. / Ms. Ms. First: Jan Last: Bauman

Title: General Manager

Contact Name: MS. JAN BAUMAN TA ID: 382161440

Profile: COUNTY-WIDE PUBLIC TRANSIT: SYSTEM OPERATING EVERY DAY EXCEPT MAJOR HOLIDAYS. DEMAND RESPONSE SERVICE IN MT. PLEASANT & ADJACENT AREAS. FLEXIBLE ROUTE SERVICE IN OUT COUNTY

Address: 4590 E. PICKARD  
MT. PLEASANT, MI 48858

Phone Number: (517) 773-2410 Fax Number: (517) 773-1873

E-Mail: ICTC@ARROWNET.COM

**Legislative Information**

| House Districts | Senate Districts | Legislators            |
|-----------------|------------------|------------------------|
| 99              | 23               | Sen. Joanne Emmons (R) |
|                 |                  | Rep. James McBryde (R) |

Ready 7/20/98 8:47 AM

# Transit Agency - Application

The **Profile** layer is active by default. To access the application information the user will now click on the **Application** layer tab to the right of the Profile tab. The Application layer will then become visible, as illustrated below.

The screenshot shows a software window titled "ISABELLA CO TRANSPORTATION COMMISSION". It features a tabbed interface with the following tabs: Profile, Application (selected), Vehicles, Equipment, Facilities, and Operating Report. Below the tabs is a dropdown menu labeled "Options" with a small arrow icon, and a label "on List". The main content area displays a table with the following data:

| Fiscal Year | Capital Request          | Operating Assistance Report | Status    | Project Manager Comments |
|-------------|--------------------------|-----------------------------|-----------|--------------------------|
| 2001        | <input type="checkbox"/> | <input type="checkbox"/>    | PRESUBMIT |                          |
| 2000        | <input type="checkbox"/> | <input type="checkbox"/>    | RESUBMIT  |                          |
| 1999        | <input type="checkbox"/> | <input type="checkbox"/>    | SUBMIT    |                          |
| 1997        | <input type="checkbox"/> | <input type="checkbox"/>    | SUBMIT    |                          |

The status bar at the bottom of the window shows "Ready" on the left and "7/20/98 9:19 AM" on the right.

This window shows a list of all annual applications submitted using PTMS by the indicated transit agency.

The Transit Agency user can now examine existing application information, or create a new application. We will focus first on examining existing information, which the authorized user could also edit if the application has a status of **Pre submit** or **Re submit**. Note that these same screens in a blank state will be used to submit a new application.

To look at the information contained in an existing application, the user will now locate the desired application in the list at the bottom of the window above, employing the vertical scroll bar if required. Once the desired application is located, the user will double-click on that row. As a result of this action the **Annual Application** window will open, with the **Checklist** layer active, as illustrated on the next page.

# Transit Agency - Application

## Checklist

The **Checklist** layer has three checklists associated with it: for **Checklist** (Regular Services), **Special Services**, and **16B2**. The Transit Agency user can access these three pages while in the Checklist layer, through the **Options** command menu button. There are also three independent windows associated with the Checklist layer, for **PM Checklist**, **PM Special Services**, and **PM 16B2**. These three windows are also accessed through the Options command menu button, and are used by the Project Manager at MDOT during the application approval process. The Special Services and 16B2 checklist windows will not be illustrated in this manual.

The checklist page is active by default when the Annual Application is opened, and is illustrated below.

Annual Application: ISABELLA CO TRANSPORTATION COMMISSION

Checklist    Capital Request    Operating Request    TA Forms

Options    on Checklist

Application Year: 1999

**Regular Services Checklist**

**Capital Assistance**

- ☐ Capital Request Form(s)
- ☐ ADA Certification /Vehicle Accessibility Plan  
**Mail Signed LAC Minutes to MDOT**
- ☐ State Certification and Assurances **(Mail to MDOT)**

**Section 5311 (Section 18)**

- ☐ Section 5333(b) Labor Warranty Letter **(Mail to MDOT)**
- ☐ Title VI information
- ☐ FTA Certification and Assurances **(Mail to MDOT)**

**Marketing**

- ☐ Grant Application
- ☐ Grant Evaluation

**Operating Assistance**

- ☐ Performance Indicators
- ☐ Operating Request (Budget)
- ☐ Coordination Plan
- ☐ Resolution of Intent **(Mail to MDOT)**

**Miscellaneous**

- ☐ Optional Contract Resolution
- ☐ Service Development and New Technology

The Checklist page is used by the Transit Agencies to complete the annual application. The user places a mark in each box as the corresponding item is completed. Note the **(Mail to MDOT)** reminders on items that need to be sent to MDOT.

The user will access the Special Services and 16B2 checklists by selecting the **Options** command menu button, and then selecting **Special Services** or **16B2** on the menu that is displayed. As a result of this action the desired page is displayed. These windows are used in the same manner as the Checklist, marking each appropriate box as the corresponding item is completed.

# Transit Agency - Application

## New Application

To create and submit a new annual application, the Transit Agency will access the **Application List** window, described and illustrated on page 5.3. Once in the window, the user will click on the **Options** command menu button, and select **New Application** from the menu displayed. As a result of this action the **New Annual Application** window is opened, with a blank **Checklist** layer/page displayed, as illustrated below.

To set up the new application, the user must first select the desired value for the **Application Year** field, and then save the record.

The user may now mark such items as are appropriate. Through the **Options** menu button, the user can access the **Special Services** and **16B2** pages for the Checklist and mark such boxes there as appropriate as well. Remember to save changes made in each page, as covered in Chapter 2. If you should forget, you will be prompted to save changes.

Creating new capital requests, operating requests, and TA forms will be covered later in this chapter.

A new application has a status of **Pre submit**, as indicated in the Application List window.

# Transit Agency - Application

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To submit the Application the user will click on the **Options** command menu button and select **Submit Application** from the displayed menu. This action changes the status to **Submit**, which will make the application available to the Project Manager for changes and approval. Until an application is submitted, the Project Manager can examine it, but can not make any changes.

Once submitted, the data in the application is frozen to the transit agency. After submitting, the agency can only make changes by resubmitting individual items. This process will be described in more detail later in this manual.

# Transit Agency - Application

## Capital Request

**Capital Request** is another layer in the Annual Application window, access to which is covered in the first part of this chapter.

Once in the Annual Application window, the user will click on the Capital Request layer tab, which will cause the **Capital Request List** to be displayed, as illustrated below.

The screenshot shows a software window titled "Annual Application: ISABELLA CO TRANSPORTATION COMMISSION". It has four tabs: "Checklist", "Capital Request" (which is selected), "Operating Request", and "TA Forms". Below the tabs is a section labeled "Options" with a dropdown menu set to "Request List". Underneath is a "Capital Request List" section. It contains an "Application Year" field with the value "2001". Below this is a table with the following data:

| Request Year | Status        | Program | Type    | Qty | Description | Action | Federal   | S  |
|--------------|---------------|---------|---------|-----|-------------|--------|-----------|----|
| 2001         | PRE-REQUESTED |         | Vehicle | 1   |             | REPLAC | 13,200.00 | 3, |

The table is followed by a large empty area with a horizontal scrollbar at the bottom. The bottom of the window has a standard Windows-style scrollbar.

To examine details of a given capital request, the user will locate it in this list, employing the scroll bars as required, and then double-click in the row of the desired request. As a result of this action the **Capital Request Detail** window is displayed, as illustrated on the next page.

# Transit Agency - Application

The screenshot shows a software window titled "Capital Request Detail" with a "History" tab. The main section is "Capital Request Item Detail". It contains fields for "Requested Year" (2000), "Application Year" (2000), "Priority (1=high)" (empty), and a "TIP" checkbox. A "Justification" text area is below. The "Current" section includes "Status" (PRE-REQUEST), "Type" (Vehicle), "SubType" (MedDty), "Action" (REPLACE), "Program" (empty), "Chg Date" (10/23/1998), and "Quantity" (1). The "Description" field contains "25-Ft Medium Duty w/o Lift - Diesel -". Below this are percentage fields: "Federal %" (80, \$58,600), "State %" (20, \$14,650), "Local %" (empty), and a "Total" of \$73,250. A "Vehicle Request Form" section contains a table with one row of data. At the bottom, there is instructional text and a "Repl Criteria" button.

| Form ID | Base Price | Additional Price | Vehicle Purchase Amount | Vehicle Purchase Status | Ext / Loc |
|---------|------------|------------------|-------------------------|-------------------------|-----------|
| 998     | 73,250     | 0                | 73,250                  | ELIGIBLE                | EXT       |

Note that the format of this window will depend upon the value in the **Type** field. For example, if value in the Type field was not Vehicle in the illustration above, the bottom **Vehicle Request Form** section would not be present.

If it is present, the user can access the Vehicle Request Form for any listed vehicle by double-clicking on the desired row in that section. This form is illustrated at the top of the next page.

# Transit Agency - Application

The screenshot shows a software window titled "Vehicle Purchase Request Form - EXTENDED". The window contains several input fields and buttons. The "Transit Agency" field is filled with "ISABELLA CO TRANSPORTATION COMMISSION". The "Vehicle Category" field is filled with "Medium Duty". Below these is a table with two columns: "Vehicle Description" and "Price". The first row of the table has "25-Ft Medium Duty w/o Lift - Diesel" in the description field and "73250" in the price field. Below the table is an "Additional Options" field, which is empty, and a "Price" field next to it, which contains "0". At the bottom left, there is a "Status" field with a dropdown menu showing "ELIGIBLE". At the bottom right, there is a "Total Price" field with "73250". In the bottom right corner of the window, there are two buttons: "Edit" and "Cancel".

| Vehicle Description                 | Price |
|-------------------------------------|-------|
| 25-Ft Medium Duty w/o Lift - Diesel | 73250 |

| Additional Options | Price |
|--------------------|-------|
|                    | 0     |

Status: ELIGIBLE      Total Price: 73250

Edit Cancel

The user can close this window to return to the Capital Request Details window.

# Transit Agency - Application

In the Capital Request Details layer the user can also access the **Replacement Criteria** window, which provides the user with information concerning the replacement of capital equipment. To access this window the user will click on the **Options** command menu button, and then click on **Repl Criteria** on the menu displayed, or click on the **Repl Criteria** button at the lower right of the Capital Request Detail layer. As a result the Replacement Criteria window is opened, as illustrated

The screenshot shows a window titled "Replacement Criteria" with three sections, each containing a table. The "Vehicle" section has columns for Type, DSL Miles, DSL Age, and HI. The "Equipment" section has columns for Type, DSL Age, and HI. The "Facility" section has columns for Structure Type, DSL Age, and HI. A "Close" button is located in the bottom right corner.

| Type            | DSL Miles | DSL Age | HI |
|-----------------|-----------|---------|----|
| VANS            | 100,000   | 4       |    |
| BUS-MED MED DTY | 200,000   | 7       |    |
| BUS-MED HVY DTY | 350,000   | 10      |    |

| Type           | DSL Age | HI |
|----------------|---------|----|
| OFFICE EQUIP   | 10      |    |
| COMPUTER EQUIP | 10      |    |

| Structure Type | DSL Age | HI |
|----------------|---------|----|
| BLOCK          | 20      | !  |
| METAL          | 20      | !  |
| WOOD FRAME     | 20      | !  |

Close

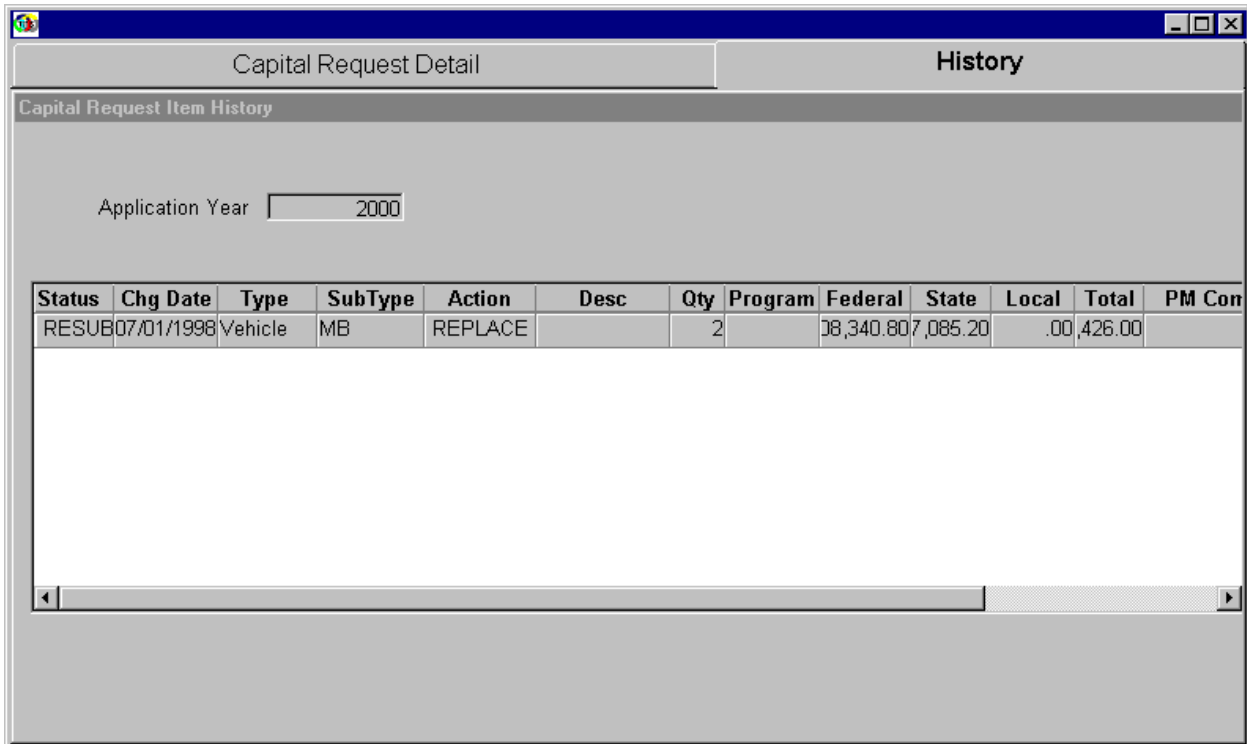
below.

The user can employ the vertical scroll bars in any of the three sections to view the information in that section.

When done with this window, the user can close it by clicking the **Close** button in the lower right corner.

# Transit Agency - Application

The Capital Request window also has a **History** layer. To access that layer the user will click on the History layer tab. This action will cause the History layer to be displayed, as illustrated below. In this window the user can examine the processing history of the active capital request.



The screenshot shows a software window titled "Capital Request Detail" with a tab labeled "History". Below the tab is a section titled "Capital Request Item History". Inside this section, there is a label "Application Year" followed by a text box containing the value "2000". Below this is a table with the following data:

| Status | Chg Date   | Type    | SubType | Action  | Desc | Qty | Program | Federal   | State    | Local | Total  | PM Con |
|--------|------------|---------|---------|---------|------|-----|---------|-----------|----------|-------|--------|--------|
| RESUB  | 07/01/1998 | Vehicle | MB      | REPLACE |      | 2   |         | 38,340.80 | 7,085.20 | .00   | 426.00 |        |

The table is displayed within a scrollable area, and a horizontal scrollbar is visible at the bottom of the table's container.

When through with the Capital Request Details window, the user can close it to return to the Capital Request List window.

# Transit Agency - Application

## New Capital Request

To create a new Capital Request, the user must first access the **Capital Request List** window, as described starting on page 5.7. Once in that window, the user will click on the **Options** command menu button, and then select **New Item** from the displayed menu. As a result of this action a blank **Capital Request Detail** window is opened, as illustrated below.

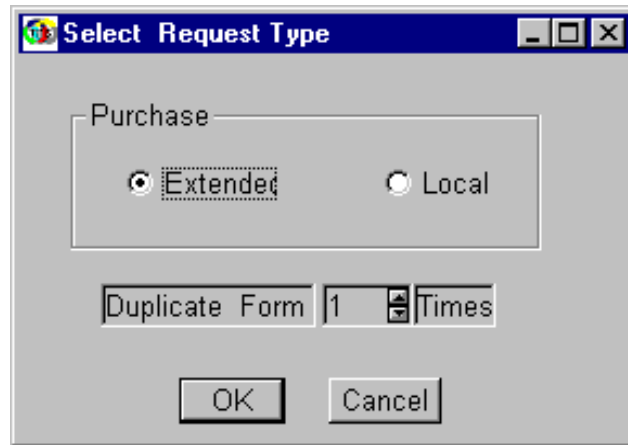
Each white box needs to be filled in. Some are text boxes, some have associated picklists.

The Subtype field will become editable when the Type field is entered, and the Action field will become editable when the Subtype field is entered. When all information is entered, the user should save the data.

If the **Type** field has a value of Vehicle, and an **Action** of Replace or Expand are entered, a **Vehicle Request Form** section will appear at the bottom of the window. To add vehicle information to that section the user *must first save* the new item record, then point to the vehicle request section and click the right mouse button to display a shortcut menu. Select **Add** from that menu. As a result of this action the user will first be prompted to indicate if the new vehicle is an extended or local purchase, as illustrated on the next page.

# Transit Agency - Application

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The user will select whether the purchase is to Extended or Local, and the number of times it is to be duplicated. Enter the number corresponding to the total number of the *identical vehicles* desired.

The duplication function allows the user to rapidly create a number of identical vehicle requests. Note that if multiple vehicles are requested in one capital request, they must be identical. PTMS will not allow the user to edit individual vehicle records within one request. Deleting a vehicle from the request will change the total number of identical vehicles requested, and adding another will create an additional identical record. A separate capital request item must be created for each vehicle having different specifications.

When the desired selections have been made in the Select Request Type window, the user will click the OK button to open the Vehicle Purchase Request Form. Note that either the Extended or Local option displays the same basic window. It is which fields are editable to the user that will be different.

The illustration at the top of the next page depicts the Extended version.

# Transit Agency - Application

The screenshot shows a window titled "Vehicle Purchase Request Form - EXTENDED". It contains the following fields and controls:

- Transit Agency :** A text box containing "CAPITAL AREA TRANSPORTATION AUTHORITY".
- Vehicle Category :** An empty text box.
- Vehicle Description :** A dropdown menu with a blue bar.
- Price :** A text box showing "\$ 0.00" next to the Vehicle Description dropdown.
- Additional Options :** A text box with up and down arrow buttons on its right side.
- Price :** A text box showing "\$ 0.00" next to the Additional Options text box.
- Status :** A dropdown menu.
- Total Price :** A text box showing "\$ 0.00" next to the Status dropdown.
- Buttons:** "Save" and "Cancel" buttons at the bottom right.

If Local is selected, different fields will be editable. See the paragraph below for Local purchase. For extended purchase the user will start by selecting a value for the **Vehicle Description** field. This action will automatically populate the Price field to the right of the Vehicle Description, and render the **Additional Options** and **Price** field below it editable. The user will fill in these fields if appropriate.

Note that the selected vehicles will automatically come with a number of options, that will be noted on the screen. The Additional Options and Price field are for options that are not usually included. This information is also in the application packet you received in the mail.

Any information entered into the Additional Options field is combined with the information in the Vehicle Description field, and used to populate Description field in the Capital Request Detail layer.

**For local purchase** the user must enter the Vehicle Description manually and enter the price for one vehicle.

The Status field is not editable by the Transit Agency user. It is used by the Project Manager in the approval process.

Once done, the user will select the Save button to store the information, and then close the window to return to the Capital Request Details window.

# Transit Agency - Application

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To increase the number of identical vehicles in a request after saving, right click in the **Vehicle Request Form** section at the bottom of the Capital Request Detail layer, and choose **Add** on the shortcut menu. The Vehicle Purchase Request Form will be displayed. You may only choose to Save or Close. Saving will increase the number of requests by one. Repeat as necessary to add additional identical vehicles to the request.

To delete a vehicle from the Capital Request Detail layer, select the vehicle to be deleted in the list in the Vehicle Request Form section at the bottom of the window by clicking it with the left mouse button. Then click the right mouse button and select **Delete** on the shortcut menu. A message box confirming the deletion will be displayed, in which the user will click OK.

# Transit Agency - Application

## Operating Request

**Operating Request** is another layer in the Annual Application window, access to which is covered in the first part of this chapter.

Once in the Annual Application window, the user will click on the Operating Request layer tab, which will cause the **Operating Request List** to be displayed, as illustrated below.

Annual Application: ISABELLA CO TRANSPORTATION COMMISSION

Checklist   Capital Request   **Operating Request**   TA Forms

Operating Request List

| Report Yr | Report Type   | Service Area  | Service Type    | Status      |
|-----------|---------------|---------------|-----------------|-------------|
| 1999      | Annl Budgeted | Nonurban Cnty | Regular Service | PM Approval |

New OAR...

To create a new OAR, see page 5.21.

To examine details of a given operating request, the user will locate it in this list, employing the scroll bars as required, and then double-click in the row of the desired request. As a result of this action the **OAR** window is displayed, as illustrated on the next page.

# Transit Agency - Application

The screenshot shows a multi-layered window titled "OAR" with three tabs: "Summary", "Financials", and "Non-Financials". The "Summary" tab is active. Inside the "Summary" layer, there is a "Summary Details" section with the following fields:

|                      |                      |                      |                 |
|----------------------|----------------------|----------------------|-----------------|
| Service Area :       | Nonurban Cnty        | Service Type :       | Regular Service |
| Report Fiscal Year : | 2000                 | Report Type :        | Annual Budgeted |
| Begin Date :         | Oct 1, 1999          | End Date :           | Sep 30, 2000    |
| Comments :           | <input type="text"/> |                      |                 |
| Status :             | Pre_submit           | Initial Submit Date: | 00/00/0000      |

At the bottom of the window, there are three buttons: "Save", "Print", and "Close".

The **OAR** window is a multi-layered window, and by default the **Summary** layer is active when it is opened, as in the illustration above.

By clicking on the **Financials** layer tab, the Financials layer is displayed, as illustrated on the next page.

# Transit Agency - Application

| Code  | Description                              | Amount<br>DR | Comments |
|-------|--|--------------|----------|
| 40100 | Passenger Fares for Transit Service      | 190000       |          |
| 40200 | Special Transit Fares                    | 165000       |          |
| 40500 | Charter Service Revenues                 | 12000        |          |
| 40710 | Sales of Maintenance Services            | 45000        |          |
| 40799 | Other NonTransportation Revenue          | 72500        |          |
| 40800 | Taxes Levied Directly for Transit Agency | 430000       |          |
| 40920 | Single Business Tax                      | 6000         |          |
| 41101 | State Formula Operating Funds            | 1006825      |          |
| 41106 | Ineligible State Marketing               | 5000         |          |
| 41301 | 49 USC Section 5311 (Section 18)         | 220495       |          |
| 41398 | Ineligible RTAP                          | 3000         |          |
| 41400 | Interest Income                          | 20000        |          |

Note that the format of this layer will depend upon the given transit agency, the service area, and the service type. The illustration above is for Nonurban County, Regular Service. Though the format and content may vary, the functionality is the same for all formats.

There are two pages to this layer, one for Revenue, which is illustrated above, and one for Expense, which is accessed by clicking the **Expense** button at the lower right of the page. The Expense layer is displayed, as illustrated on the next page.

In both the Financials and Non-Financials layers, there is no total by column at the bottom of the windows. To observe totaling and subtotalling relating to these figures, the user should view the corresponding reports. See page 5.27 for information on viewing totals and printing reports.

# Transit Agency - Application

**Expense**   ( Annual )Financial Codes

| Code  | Description                   | Amount<br>DR | Comments  |
|-------|-------------------------------|--------------|-----------|
| 50101 | Operators' Salaries & Wages   | 674000       |           |
| 50102 | Other Salaries & Wages        | 286000       |           |
| 50103 | Dispatchers' Salaries & Wages | 242000       |           |
| 50200 | Fringe Benefits               | 464000       |           |
| 50302 | Advertising Fees              | 10000        |           |
| 50399 | Other Services                | 56000        |           |
| 50401 | Fuel & Lubricants             | 110000       |           |
| 50402 | Tires & Tubes                 | 20000        |           |
| 50499 | Other Materials & Supplies    | 131000       |           |
| 50500 | Utilities                     | 27500        |           |
| 50603 | Premium for Public Liability  | 66500        |           |
| 50699 | Other Insurance               | 2400         |           |
| 50902 | Travel & Meetings             | 7000         |           |
| 50999 | Other Miscellaneous Expenses  | 24000        |           |
| 51200 | Leases & Rentals              | 3000         |           |
| 51300 | Depreciation                  | 335000       |           |
| 55003 | Ineligible Federal Grants     | 3000         | RTAP      |
| 55004 | Ineligible State Grants       | 5000         | MARKETING |
| 55007 | Ineligible Depreciation       | 315000       |           |
| 55008 | Other Ineligible Expenses     | 114750       |           |
| 55015 | Ineligible Charter Expense    | 7000         |           |

<< Revenue <<

Note that the button now reads **Revenue** and can be used to toggle back to the Expense layer.

By clicking on the **Non-Financials** layer tab, the Non-Financials layer is displayed, as illustrated on the next page.

# Transit Agency - Application

Summary

Financials

Non-Financials

Non-Financial Codes

**Public Service**

| Code | Description                          | Weekday<br>DR | Saturday<br>DR | Sunday<br>DR | Total   |
|------|--------------------------------------|---------------|----------------|--------------|---------|
| 610  | Vehicle Hours                        | 48000         | 4000           | 2700         | 54,700  |
| 611  | Vehicle Miles                        | 600000        | 52000          | 27000        | 679,000 |
| 615  | Passengers - Regular                 | 50000         | 14000          | 3000         | 67,000  |
| 616  | Passengers - Elderly                 | 24000         | 6000           | 2000         | 32,000  |
| 617  | Passengers - Persons w/ Disabilities | 77000         | 7000           | 2500         | 86,500  |

**Vehicle**

| Code | Description                      | Quantity |
|------|----------------------------------|----------|
| 655  | Total Demand-Response Vehicles   | 29       |
| 656  | Demand-Response Vehicle w/ Lifts | 29       |

**Miscellaneous**

| Code | Description                                     | Quantity<br>DR | Explanation |
|------|---|----------------|-------------|
| 630  | Charter Service Hours                           | 180            |             |
| 660  | Fuel - Gallons Consumed                         | 89000          |             |
| 661  | Total Transit Agency Employees (Full-Time Equi  | 50             |             |
| 662  | Total Revenue Vehicle Operators (Full-Time Equi | 33             |             |

Note that the format of this layer will depend upon the given transit agency, the service area, and the service type. The illustration above is for Nonurban County, Regular Service. Though the format and content may vary, the functionality is the same for all formats.

When done with the **OAR** window, the user can close it to return to the **Operating Request List** window.

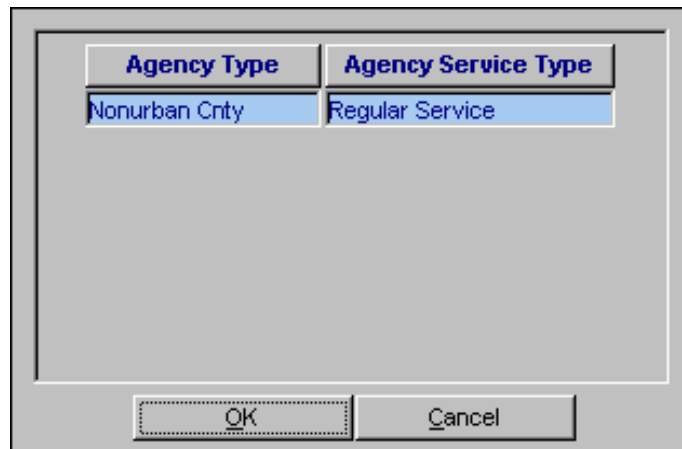
# Transit Agency - Application

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## New Operating Request

To create a new Operating Request, the user must first access the **Operating Request List** window, as described starting on page 5.16.

Once in that window, the user will click on the **New OAR** button at the bottom of the window. As a result of this action the user will be prompted to indicate which service the new request is for, as illustrated below.



The screenshot shows a dialog box with a table at the top. The table has two columns: 'Agency Type' and 'Agency Service Type'. Under 'Agency Type', there is one row with the text 'Nonurban Crty'. Under 'Agency Service Type', there is one row with the text 'Regular Service'. Below the table, there are two buttons: 'OK' and 'Cancel'.

| Agency Type   | Agency Service Type |
|---------------|---------------------|
| Nonurban Crty | Regular Service     |

OK Cancel

The user will select the desired Service Area/Service Type by clicking in the appropriate row in this box, then select the **OK** button. Note that even if only one row is present, as illustrated above, the user must click in that row prior to clicking OK. As a result a **New Operating Assistance report** window is opened, with the **Summary** layer displayed, as illustrated on the next page.

# Transit Agency - Application

The screenshot shows a software window titled "Transit Agency - Application" with three tabs: "Summary", "Financials", and "Non-Financials". The "Summary" tab is active, displaying a "Summary Details" form. The form contains the following fields:

|                      |                      |                      |                 |
|----------------------|----------------------|----------------------|-----------------|
| Service Area :       | Nonurban Cnty        | Service Type :       | Regular Service |
| Report Fiscal Year : | 2000                 | Report Type :        | Annual Budgeted |
| Begin Date :         | Oct 1, 1999          | End Date :           | Sep 30, 2000    |
| Comments :           | <input type="text"/> |                      |                 |
| Status :             | Pre_submit           | Initial Submit Date: | 00/00/0000      |

At the bottom of the window, there are three buttons: "Save", "Print", and "Close".

The user can now access the **Summary**, **Financials**, and **Non-Financials** layers as appropriate to enter necessary information. Note that the Financials layer contains pages for Revenue and Expense. The user should save all changes in each layer before changing layers, though prompting will occur if required.

The default status for a new Operating Request is **Pre submit**. Once the application is submitted, the budget status will automatically change to **Submit**. If a resubmission of the OAR is required, your project manager must change the status to **Resubmit**, which will enable the Transit Agency to revise the report and **submit** again. Other possible statuses are **PAS Approved**, **PAS Denied**, and **PM Approval**. By monitoring the status of the OAR, the transit agency can follow its progress.

The Summary layer information for a budget report will be automatically generated by PTMS based on the fiscal year of the application.

# Transit Agency - Application

## Financials Layer

The Financials layer of the Operating Request window, with Revenue page displayed, for a new budget is illustrated below.

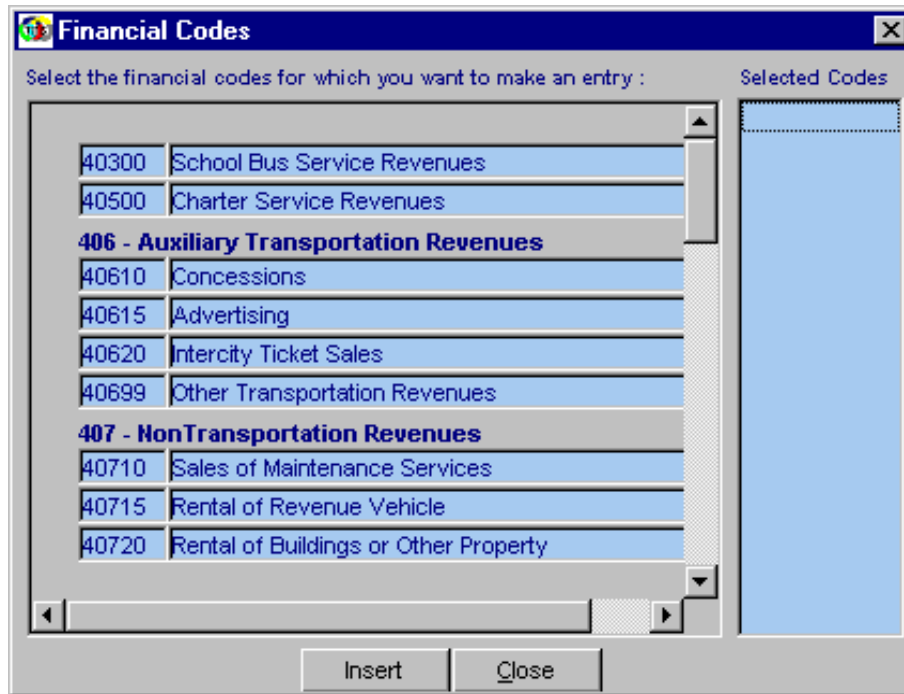
| Code  | Description                                    | Amount<br>DR | Comments |
|-------|--|--------------|----------|
| 40100 | Passenger Fares for Transit Service            |              |          |
| 40200 | Special Transit Fares                          |              |          |
| 40300 | School Bus Service Revenues                    |              |          |
| 40400 | Freight Tariffs / Package Delivery             |              |          |
| 40500 | Charter Service Revenues                       |              |          |
| 40610 | Concessions                                    |              |          |
| 40615 | Advertising                                    |              |          |
| 40620 | Intercity Ticket Sales                         |              |          |
| 40699 | Other Transportation Revenues                  |              |          |
| 40710 | Sales of Maintenance Services                  |              |          |
| 40715 | Rental of Revenue Vehicle                      |              |          |
| 40720 | Rental of Buildings or Other Property          |              |          |
| 40725 | Parking Lot Revenue                            |              |          |
| 40799 | Other NonTransportation Revenue                |              |          |
| 40800 | Taxes Levied Directly for Transit Agency       |              |          |
| 40910 | Local General Operating Assistance             |              |          |
| 40915 | Local Special Demonstration Project Assistance |              |          |
| 40920 | Single Business Tax                            |              |          |
| 40999 | Other Local Grants & Reimbursements            |              |          |
| 41101 | State Formula Operating Funds                  |              |          |
| 41105 | Ineligible State Planning                      |              |          |
| 41106 | Ineligible State Marketing                     |              |          |
| 41199 | Other Ineligible State Grants & Reimbursement  |              |          |
| 41301 | 49 USC Section 5311 (Section 18)               |              |          |
| 41302 | 49 USC Section 5307 (Section 9)                |              |          |

When the user is creating the initial budgetary OAR for a given fiscal year, this window will display all of the current codes, as illustrated.

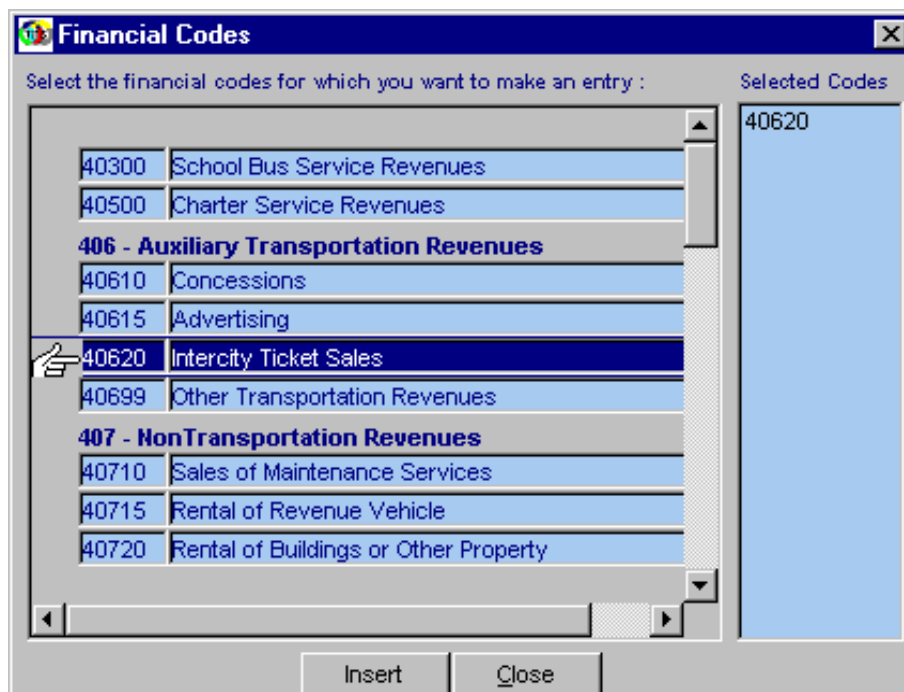
When all of the data is entered on a page, the user must save before moving to another page. Once saved, only those lines containing data (not blanks or zero) will appear on the screen.

After saving, if a user requires a row that is not present, it can be added through the use of the **Financial Codes** button at the upper right of the window. Clicking on the Financial Codes button displays the Financial Codes window, as illustrated at the top of the next page.

# Transit Agency - Application



The user will locate the desired code by using the vertical scroll bar. When the desired row is located, the user will point to it and double-click to place the code in the **Selected Codes** section at the right of the window, as illustrated below.



# Transit Agency - Application

When all codes to be added have been collected in the Selected codes list, the user will click the **Insert** button at the bottom of the window. This action will close the Financial Codes window, and return the user to the Financials layer with the new code lines inserted.

**NOTE:** The user must enter the desired data in the new code lines *prior* to saving the window. When the Save is performed, any lines with data fields that are empty, or that contain only zeroes, are eliminated.

When the Revenue page is complete, the user will then click on the **Expense** button at the lower right of this window to complete the Expense page, illustrated below.

| Code  | Description                      | Operations DR | Maintenance | General Admin DR | Total | Comments |
|-------|----------------------------------|---------------|-------------|------------------|-------|----------|
| 50101 | Operators' Salaries & Wages      |               |             |                  |       |          |
| 50102 | Other Salaries & Wages           |               |             |                  |       |          |
| 50103 | Dispatchers' Salaries & Wages    |               |             |                  |       |          |
| 50200 | Fringe Benefits                  |               |             |                  |       |          |
| 50302 | Advertising Fees                 |               |             |                  |       |          |
| 50399 | Other Services                   |               |             |                  |       |          |
| 50401 | Fuel & Lubricants                |               |             |                  |       |          |
| 50402 | Tires & Tubes                    |               |             |                  |       |          |
| 50499 | Other Materials & Supplies       |               |             |                  |       |          |
| 50500 | Utilities                        |               |             |                  |       |          |
| 50603 | Premium for Public Liability     |               |             |                  |       |          |
| 50699 | Other Insurance                  |               |             |                  |       |          |
| 50700 | Taxes                            |               |             |                  |       |          |
| 50800 | Purchased Transportation Service |               |             |                  |       |          |
| 50902 | Travel & Meetings                |               |             |                  |       |          |
| 50999 | Other Miscellaneous Expenses     |               |             |                  |       |          |
| 51101 | Interest on Long-Term Debt       |               |             |                  |       |          |
| 51102 | Interest on Short-Term Debt      |               |             |                  |       |          |
| 51200 | Leases & Rentals                 |               |             |                  |       |          |
| 51300 | Depreciation                     |               |             |                  |       |          |
| 55003 | Ineligible Federal Grants        |               |             |                  |       |          |
| 55004 | Ineligible State Grants          |               |             |                  |       |          |
| 55005 | Ineligible Local Grants          |               |             |                  |       |          |
| 55006 | Ineligible Interest Expense      |               |             |                  |       |          |

# Transit Agency - Application

## Non-Financials Layer

To access the Non-Financials layer, the user will click on the corresponding tab at the top of the OAR window. As a result the Non-Financials layer will be displayed, as illustrated below.

**Summary** **Financials** **Non-Financials**

Non-Financial Codes

**Public Service**

| Code | Description                          | Weekday DR | Saturday DR | Sunday DR | Total |
|------|--------------------------------------|------------|-------------|-----------|-------|
| 610  | Vehicle Hours                        |            |             |           |       |
| 611  | Vehicle Miles                        |            |             |           |       |
| 615  | Passengers - Regular                 |            |             |           |       |
| 616  | Passengers - Elderly                 |            |             |           |       |
| 617  | Passengers - Persons w/ Disabilities |            |             |           |       |

**Vehicle**

| Code | Description                      | Quantity |
|------|----------------------------------|----------|
| 653  | Total Line-Haul Vehicles         |          |
| 654  | Line-Haul Vehicle w/ Lifts       |          |
| 655  | Total Demand-Response Vehicles   |          |
| 656  | Demand-Response Vehicle w/ Lifts |          |
| 658  | Total Transit Vehicles           |          |

**Miscellaneous**

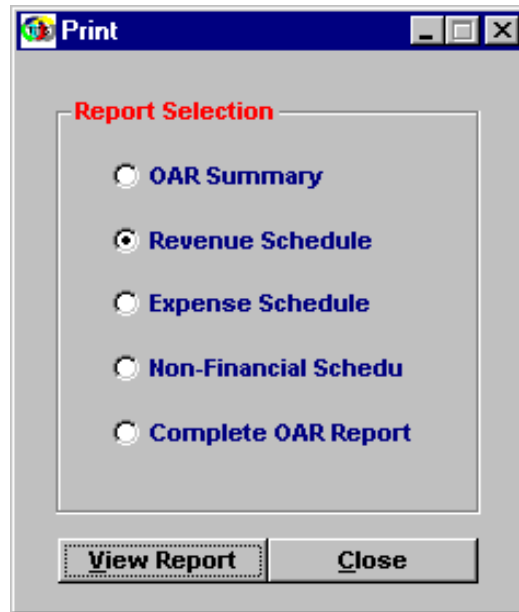
| Code | Description                            | Quantity DR | Explanation |
|------|--|-------------|-------------|
| 601  | Number of Routes (Line Haul Only)      |             |             |
| 602  | Number of Route Miles (Line Haul Only) |             |             |
| 630  | Charter Service Hours                  |             |             |
| 631  | Charter Service Miles                  |             |             |
| 632  | School Bus Service Hours               |             |             |
| 633  | School Bus Service Miles               |             |             |
| 634  | Other Service Hours (Explain)          |             |             |

When the user is creating the initial OAR, this window will display all of the current codes, as illustrated.

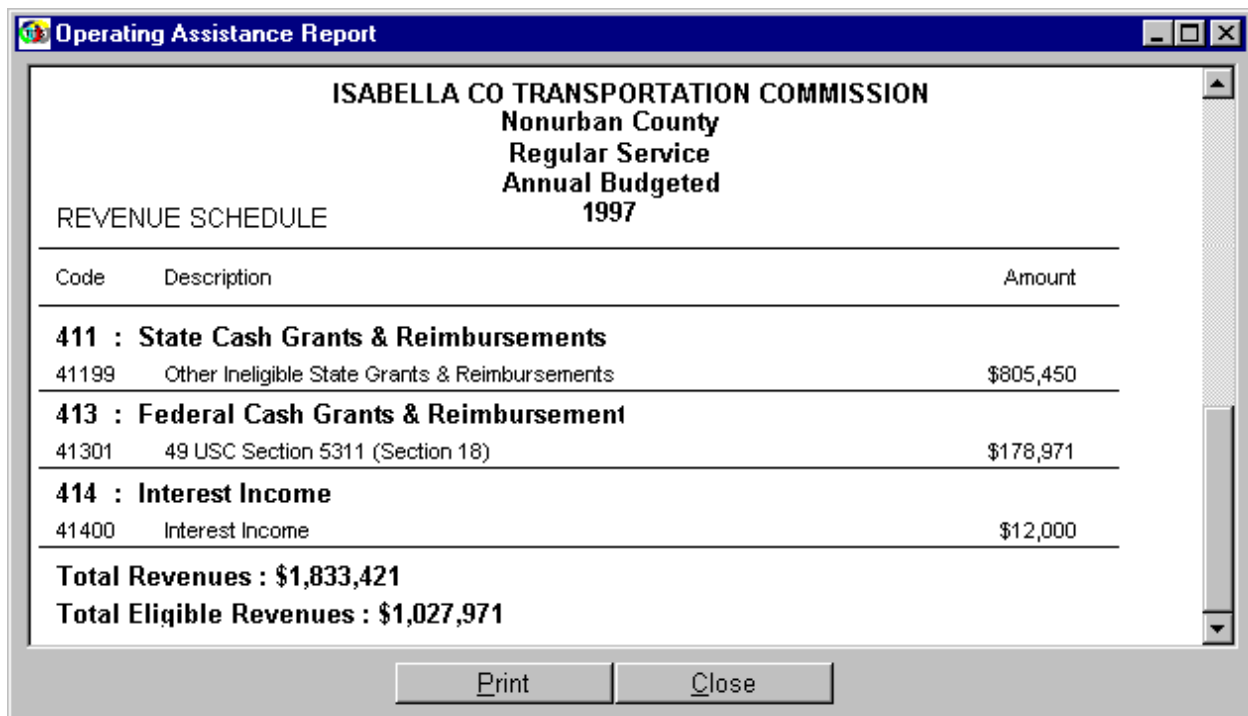
After saving a page, only those lines containing data (not blanks or zero) will appear on the screen. Rows/codes may be added back in using the Financial Codes button, as described on page 5.23.

# Transit Agency - Application

In both the Financials and Non-Financials layers, there is no total by column at the bottom of the windows. To observe totaling and subtotalling relating to these figures, the user should view the corresponding reports. Selecting the **Print** button at the bottom of the window will cause the Print dialog box to be displayed, as illustrated below.



The user will select desired report by clicking on it, and then view the report in print preview by selecting the **View Report** button. An example of a previewed report with totals displayed appears below. To print the previewed report, click on the Print button at the bottom of the window.



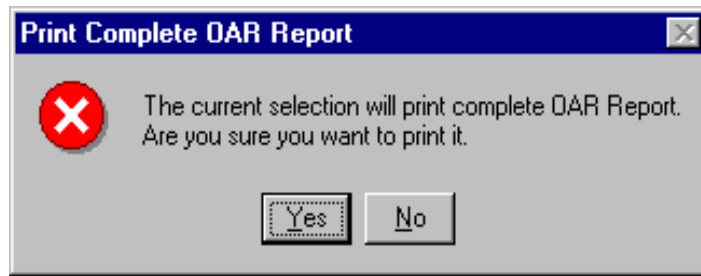
| Code   | Description                                    | Amount    |
|--|--|-----------|
| <b>411 : State Cash Grants &amp; Reimbursements</b>  |  |           |
| 41199  | Other Ineligible State Grants & Reimbursements | \$805,450 |
| <b>413 : Federal Cash Grants &amp; Reimbursement</b> |  |           |
| 41301  | 49 USC Section 5311 (Section 18)               | \$178,971 |
| <b>414 : Interest Income</b>                         |  |           |
| 41400  | Interest Income                                | \$12,000  |
| <b>Total Revenues : \$1,833,421</b>                  |  |           |
| <b>Total Eligible Revenues : \$1,027,971</b>         |  |           |

# Transit Agency - Application

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Note that the Complete OAR report cannot be previewed without printing, and when selected the button will change to **Print Report**.

On clicking the Print Report button, a message box will be displayed confirming the users desire to print the report, as illustrated below.



On selecting the **Yes** button in that window, the report will print.

When all layers of the new OAR have been completed and saved, the report can be submitted from the Summary layer, by selecting **Submit** in the **Status** field, and then saving the record.

# Transit Agency - Application

## TA Forms

**TA Forms** is another layer in the Annual Application window, access to which is covered in the first part of this chapter.

Once in the Annual Application window, the user will click on the TA Forms layer tab, which will cause the **TA Forms** window to be displayed, as illustrated below.

Annual Application: ISABELLA CO TRANSPORTATION COMMISSION

Checklist | Capital Request | Operating Request | **TA Forms**

Options ▾

**Application Type**

- ☒ Regular Service
- ☐ 16 (B)(2)
- ☐ Specialized Services
- ☐ Service Development

TA Form Type

Application Year

**IMPORTANT NOTE!!!**  
After "Update Form:" in WordPerfect, YOU MUST go to Options button and Save BEFORE selecting another form or closing this screen.

*Double Click on the document to edit it.*

This window provides access to all the additional forms needed in the annual application.

To view a filled out form, the user will first select the desired option in the **Application Type** option group in the upper left of the window. The user will then click on the small gray box at the right end of the **TA Form Type** field to view a list of forms available for the selected application type. In this list the user will click on the desired form type. This action will cause the selected form to be displayed in the bottom section of the window. If the form has already been filled out for the selected application, the user will be able to view the details here.

# Transit Agency - Application

The illustration below shows a retrieved TA Form, for Regular Services, for 5311 Title VI Info.

The screenshot shows a software window titled "Options" with a dropdown arrow. Inside, there's a section for "Application Type" with four radio buttons: "Regular Service" (selected), "16 (B)(2)", "Specialized Services", and "Service Development". To the right, "TA Form Type" is set to "5311 Title VI Info" and "Application Year" is "2001". An "IMPORTANT NOTE!!!" is displayed, stating: "After 'Update Form:' in WordPerfect, YOU MUST go to Options button and Save BEFORE selecting another form or closing this screen." Below this is a button that says "Double Click on the document to edit it." The main content area is titled "ATTACHMENT B TITLE VI INFORMATION" and has a "Return to MDOT" link in the top right. It contains a text field for "Name of Applicant" and a paragraph stating: "All Section 5311 (former Section 18) recipients must submit the following general information:". Below this is a numbered list starting with "1. A list of any active lawsuits or complaints using the applicant which allege discrimination on the basis of race, color, or national origin with respect to service or other transit benefits. The list should include: the date the lawsuit or complaint, including whether the parties to a lawsuit have entered into a consent".

If the user wants to edit the form, the user will point to the form and double-click. This action will cause the WordPerfect program to start, and the selected form will be automatically loaded in to WordPerfect.

The user may then employ WordPerfect to make such changes as are desired. Note that on certain items in the document, bubble help indicators will appear, as illustrated at the right. Simply point and click on these indicators to obtain useful information about completing the document.



When done in WordPerfect, it is important to leave WordPerfect in the appropriate manner. **DO NOT SAVE** the form in WordPerfect. Instead, under the **File** menu in WordPerfect, select something similar to **Update Form**. The exact wording of the command may vary with the version of WordPerfect, but the idea is to update the form. To return to PTMS, select something similar to **Exit & Return to Form**, closing WordPerfect in the process. As a result the form is stored as a data object in PTMS, not as a document file in WordPerfect, and is attached to the application.

By storing the forms in PTMS in this manner, they are accessible to the MDOT personnel processing the application.

# Transit Agency - Application

## New TA Forms

To create a new TA Form, the user must first access the Annual Application window as described on page 5.2. Then the user will click on the **TA Forms** layer tab, which will cause the **TA Forms** window to be displayed, as illustrated below.

This window provides access to all of the additional forms needed in the annual application.

To fill out a form, the user will first select the desired option in the **Application Type** option group in the upper left of the window. The user will then click on the small gray box at the right end of the **TA Form Type** field to view a list of forms available for the selected application type. In this list the user will click on the desired form type. If the selected form has not been created before, the user will be asked if he/she wants to create a new one, in a small window that appears at the bottom of the screen, as illustrated below.

Select the **Yes** button in the message window to continue the process. This action will cause the selected form to be displayed in the bottom of the window.

# Transit Agency - Application

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The user will now point to the form and double-click. This action will cause the WordPerfect program to start and the selected form will be automatically loaded in to WordPerfect. The user may then employ WordPerfect to fill in the form.

The user may then employ WordPerfect to make such changes as are desired. Note that on certain items in the document bubble help indicators will appear, as illustrated at the right. Simply point and click on these indicators to obtain useful information about completing the document.



When done in WordPerfect, it is important to leave WordPerfect in the appropriate manner. **DO NOT SAVE** the form in WordPerfect. Instead, under the **File** menu in WordPerfect, select something similar to **Update Form**.

The exact wording of the command may vary with the version of WordPerfect, but the idea is to update the form. To return to PTMS, select something similar to **Exit & Return to Form**, closing WordPerfect in the process. As a result the form is stored as a data object in PTMS, not as a document file in WordPerfect, and is attached to the application.

**IMPORTANT:** If a user is planning to create multiple forms in one session, the user must be sure to save each form by selecting the **Save** command under the **Options** menu button prior to working on another form, or the data entered into the prior form will be lost.

By storing the forms in PTMS in this manner, they are accessible to the MDOT personnel processing the application.

## **Transit Agency – Vehicles**

Last Chapter Update: 12/8/98

# Transit Agency - Vehicles

## Overview

This chapter will focus on the use of the **Vehicle** layer in the Transit Agency window. We have always requested a vehicle inventory with your annual application – now we will just ask you to verify your inventory at the time you do your annual application. If you find problems with your inventory that you are not able to correct, please contact Jill Adams at (517) 373-2307 or e-mail: [adamsji@mdot.state.mi.us](mailto:adamsji@mdot.state.mi.us).

## Accessing Vehicle Information

To access transit vehicle information, the user must first start PTMS as discussed starting on page 2.3. Then the user must locate the record for the transit agency for which vehicle information is desired, as discussed starting on page 3.2. Once the correct record is located, the user will point to and double-click on the desired agency in the **Open TA** window. As a result of this action the **Transit** window opens for the selected agency. Note that in the illustration below, it is the **GOGEBIC COUNTY PUBLIC TRANSIT** window.

The screenshot shows a software window titled "GOGEBIC COUNTY PUBLIC TRANSIT". It has a menu bar with "Profile", "Application", "Vehicles", "Equipment", "Facilities", and "Operating Report". Below the menu bar is a tabbed interface with "Options" and "Characteristics" tabs. The "Characteristics" tab is active, showing a form for "TA Characteristics".

**TA Characteristics**

|               |  |              |                |
|---------------|--|--------------|----------------|
| TA Name:      | GOGEBIC COUNTY PUBLIC TRANSIT              |              |                |
| Mr. / Ms.     | Mr.  | First: James | Last: Mildren  |
| Title:        | Manager                                    |              |                |
| Contact Name: | MR. JAMES MILDREN                          | TA ID:       | 386004851      |
| Profile:      | M-F 6 A.M. - 6 P.M.                        |              |                |
| Address:      | 235 E. MCLEOD AVENUE<br>IRONWOOD, MI 49938 |              |                |
| Phone Number: | (906) 932-2523                             | Fax Number:  | (906) 932-1493 |
| E-Mail:       | bluebus@gogebic.cc.mi.us                   |              |                |

**Legislative Information**

| House Districts | Senate Districts | Legislators              |
|-----------------|------------------|--------------------------|
| 110             | 38               | Sen. Donald Koivisto (D) |
|                 |                  | Rep. Paul Tesanovich (D) |

The status bar at the bottom shows "Ready" on the left and "7/20/98 11:18 AM" on the right.

# Transit Agency - Vehicles

The **Profile** layer is active by default. To access the **Vehicle** information the user will now click on the **Vehicle** layer tab. The **Vehicle** list will then become visible, as illustrated below.

**GOGEBIC COUNTY PUBLIC TRANSIT**

Profile Application **Vehicles** Equipment Facilities Operating Report

Options List

**Fleet Information (All Operated Vehicles)**

Total Fleet:  Total Lift:  Spare Ratio:   
Total Reserve:  Total at Peak Hour:  **20% and Below meets Guidelines**

| Vehicle ID Number | State ID | Local ID | Status   | Type         | Seats | Lift Seats | Model Yr | Miles   | HI |
|-------------------|----------|----------|----------|--------------|-------|------------|----------|---------|----|
| 1FDKE30F7SHC02382 | 712516   | 102      | ASSIGNED | BUS-SM LGT D | 10    | 1          | 1995     | 51,109  |    |
| 1GBE6T1E0LV110445 | 711901   | 101      | ASSIGNED | BUS-MED MED  | 12    | 2          | 1990     | 188,084 |    |
| 1GBE6T1E5LV111798 | 712026   | 104      | ASSIGNED | BUS-MED MED  | 12    | 2          | 1991     | 143,631 |    |
| 1GBE6T1E7LV111799 | 712027   | 103      | ASSIGNED | BUS-MED MED  | 12    | 2          | 1991     | 109,683 |    |
| 1GBE6T1EXLV111800 | 712028   | 105      | ASSIGNED | BUS-MED MED  | 12    | 2          | 1991     | 110,229 |    |
| 1GBG6S1M8NJ100430 | 712090   | 106      | ASSIGNED | BUS-MED MED  | 22    | 0          | 1992     | 33,742  |    |

Ready 7/20/98 11:20 AM

You will see a list of all the vehicles assigned to that agency. Fill in the **Total Reserve** and **Total at Peak Hour** text boxes.

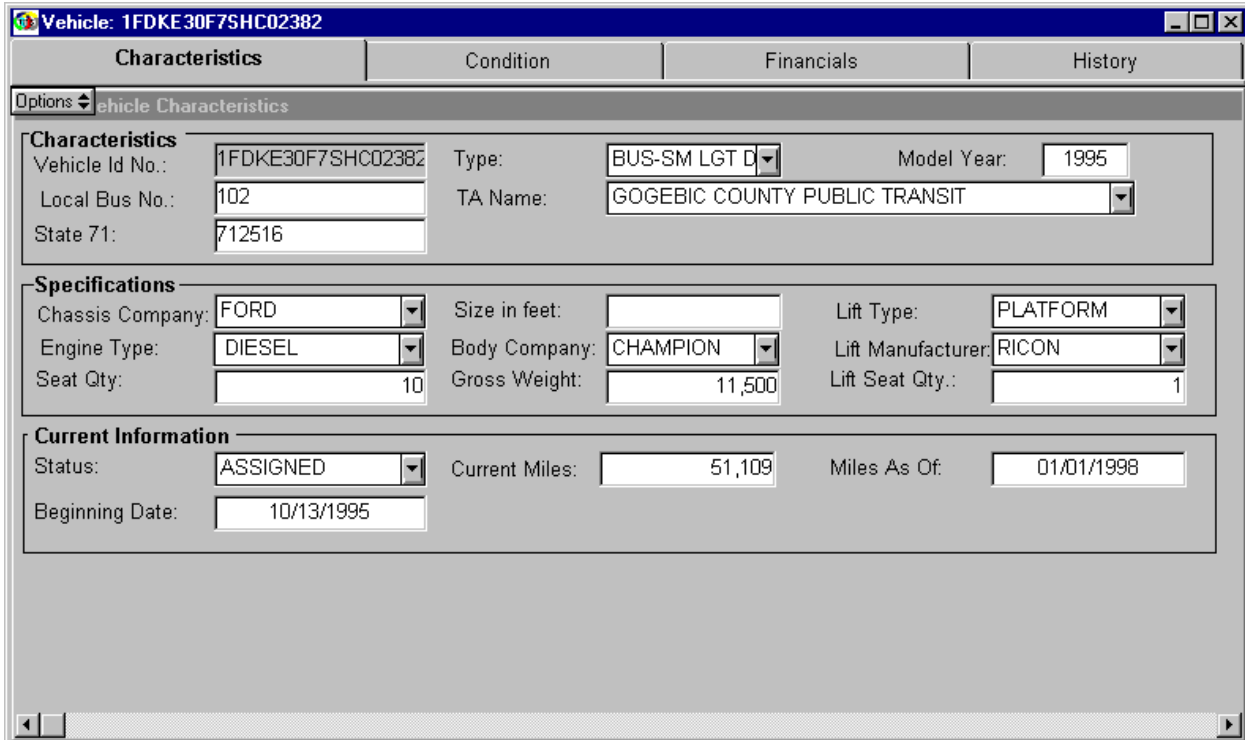
Note that the table section of the window can be sorted as described in Chapter 2. This may help the user locate the desired vehicle record (row), which the user must do to access and edit existing information. Once the record is located, the user will point to and double-click on that record to access the **Vehicle** window illustrated on the next page.

By clicking on the **Options** command menu button, and selecting **New Vehicle** from the displayed menu, an empty version of the following window will be displayed for the entry of the indicated information for the new vehicle.

# Transit Agency - Vehicles

## Vehicle – Characteristics

When the user double-clicks on a given record in the Vehicle list window illustrated on the previous page, the **Vehicle** window illustrated below opens, having window layers for **Characteristics**, **Condition**, **Financials**, and **History**. By default, the Characteristics layer is displayed.



The screenshot shows a software window titled "Vehicle: 1FDKE30F7SHC02382". It has four tabs: "Characteristics", "Condition", "Financials", and "History". The "Characteristics" tab is active. Below the tabs is a section labeled "Options" with a dropdown menu set to "Vehicle Characteristics". The main area contains three sections: "Characteristics", "Specifications", and "Current Information".

| Characteristics |                               |
|-----------------|-------------------------------|
| Vehicle Id No.: | 1FDKE30F7SHC02382             |
| Local Bus No.:  | 102                           |
| State 71:       | 712516                        |
| Type:           | BUS-SM LGT D                  |
| TA Name:        | GOGEBIC COUNTY PUBLIC TRANSIT |
| Model Year:     | 1995                          |

| Specifications     |          |
|--------------------|----------|
| Chassis Company:   | FORD     |
| Engine Type:       | DIESEL   |
| Seat Qty:          | 10       |
| Size in feet:      |          |
| Body Company:      | CHAMPION |
| Gross Weight:      | 11,500   |
| Lift Type:         | PLATFORM |
| Lift Manufacturer: | RICON    |
| Lift Seat Qty.:    | 1        |

| Current Information |            |
|---------------------|------------|
| Status:             | ASSIGNED   |
| Beginning Date:     | 10/13/1995 |
| Current Miles:      | 51,109     |
| Miles As Of:        | 01/01/1998 |

This window provides information concerning the vehicle ID, specifications, and status.

# Transit Agency - Vehicles

## Vehicle – Financials

Once the user has accessed the **Vehicle** window, as described in the previous section, the user can access the **Financials** layer by clicking on the **Financials** layer tab. This action will cause the Financials layer to be displayed, as illustrated below.

Vehicle: 1FDKE30F7SHC02382

Characteristics   Condition   **Financials**   History

Options ▾ Vehicle Financials

**Purchase Information**

|                   |   |                  |  |
|-------------------|---|------------------|--|
| PO Number         | <input type="text" value="QK7099"/>     | Purchase Cost:   | <input type="text" value="49,243.00"/>     |
| Contract Number   | <input type="text" value="94-0929"/>    | Program:         | <input type="text" value="SEC 5311 form"/> |
| Federal Grant No: | <input type="text"/>                    | Purchase Reason: | <input type="text" value="REPLACEMENT"/>   |
| Delivery Date:    | <input type="text" value="10/13/1995"/> | Delivery Miles:  | <input type="text" value="636"/>           |

**Improvement**

Type:  Cost:  Date:

Description:

**Improvement History**

| Type | Date | Cost | Vehicle Improvement Description |
|------|------|------|---------------------------------|
|      |      |      |                                 |

This window gives you purchase information (grant number, purchase price, etc.) and improvement information (rehab, remanufacture, etc.) with a history of the improvements visible in the history box. Improvements will be entered either by you or MDOT personnel, depending on what type of funds were used for the improvement.

# Transit Agency - Vehicles

## Vehicle - History

Once the user has accessed the **Vehicle** window, as described in the previous section, the user can access the **History** layer by clicking on the **History** layer tab. This action will cause the History layer to be displayed, as illustrated below.

Vehicle: 1FDKE30F7SHC02382

Characteristics Condition Financials History

Status

Vehicle ID: 1FDKE30F7SHC02382

| Status   | Begin Date | End Date   | Miles | TA                            |
|----------|------------|------------|-------|-------------------------------|
| ASSIGNED | 10/30/0095 | 00/00/0000 | 51    | GOGEBIC COUNTY PUBLIC TRANSIT |

This window gives the user information regarding where the vehicle has been, and the dates when it was moved. Entries in the History layer are triggered by a change in status.

## **Transit Agency – Equipment**

Last Chapter Update: 12/8/98

# Transit Agency - Equipment

## Overview

This chapter will focus on the use of the **Equipment** layer in the Transit Agency window. We are requesting that you enter your equipment valued over \$5,000 into the equipment inventory. Entering information for equipment less than \$5,000 in value is optional. This chapter discusses the windows to be used for this data entry.

## Accessing Equipment Information

To access transit agency equipment information, the user must first start PTMS as discussed starting on page 2.3. Then the user must locate the record for the transit agency for which equipment information is desired as discussed starting on page 3.2. Once the correct record is located, the user will point to and double-click on the desired agency in the **Open TA** window. As a result of this action the Transit window opens for the selected agency. Note that in the illustration below, it is the **GOGEBIC COUNTY PUBLIC TRANSIT** window.

The screenshot shows a software window titled "GOGEBIC COUNTY PUBLIC TRANSIT". It has a menu bar with "Options" and "Characteristics". Below the menu bar is a tabbed interface with tabs for "Profile", "Application", "Vehicles", "Equipment", "Facilities", and "Operating Report". The "Profile" tab is currently selected. The "TA Characteristics" section contains the following fields:

- TA Name: GOGEBIC COUNTY PUBLIC TRANSIT
- Mr. / Ms.: Mr. First: James Last: Mildren
- Title: Manager
- Contact Name: MR. JAMES MILDREN TA ID: 386004851
- Profile: M-F 6 A.M. - 6 P.M.
- Address: 235 E. MCLEOD AVENUE  
IRONWOOD, MI 49938
- Phone Number: (906) 932-2523 Fax Number: (906) 932-1493
- E-Mail: bluebus@gogebic.cc.mi.us

The "Legislative Information" section contains three tables:

| House Districts |
|-----------------|
| 110             |

| Senate Districts |
|------------------|
| 38               |

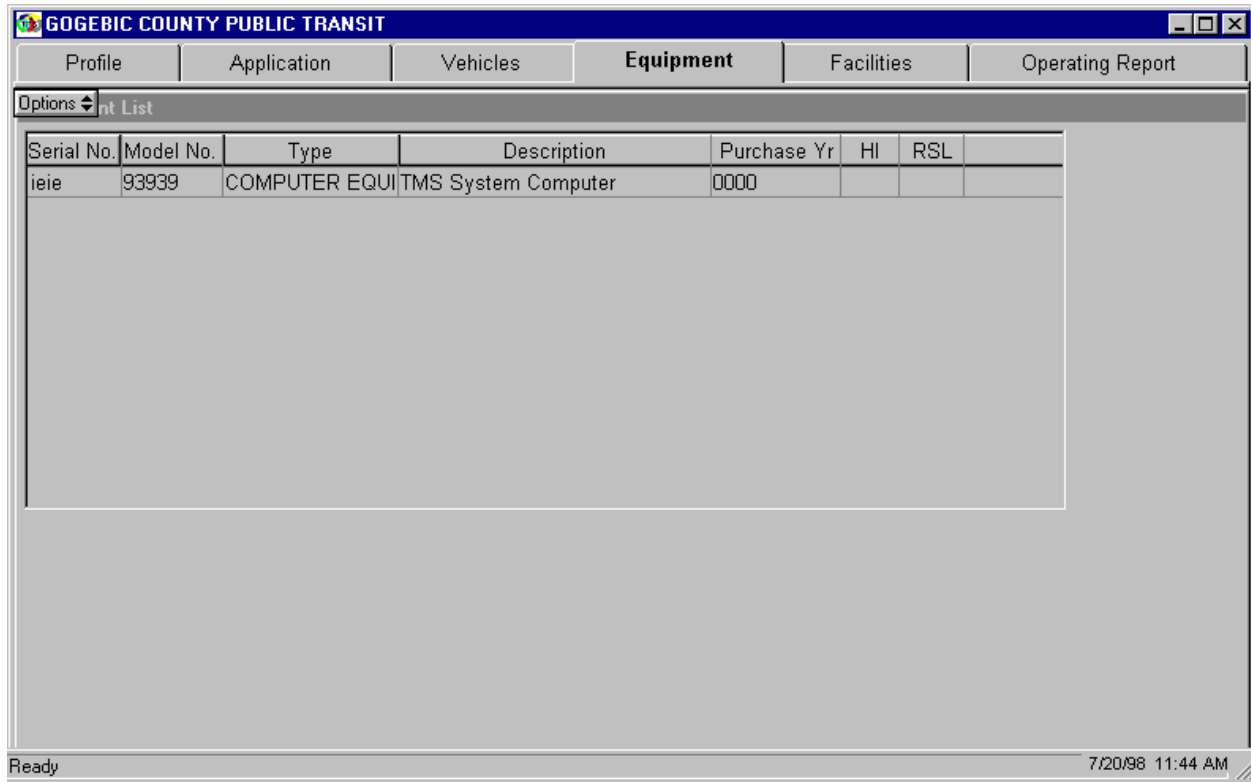
| Legislators              |
|--------------------------|
| Sen. Donald Koivisto (D) |
| Rep. Paul Tesanovich (D) |

The status bar at the bottom shows "Ready" on the left and "7/20/98 11:18 AM" on the right.

The **Profile** layer is active by default. To access the equipment information the user will now click on the **Equipment** layer tab to the right of the Profile tab.

# Transit Agency - Equipment

The **Equipment** layer will then become visible, as illustrated below.



You will see a list of all the equipment owned by the selected agency.

Note that the list in the table form section of the window can be sorted as described in Chapter 2. This may help the user locate the desired equipment record (row), which the user must do to access and edit existing information. Once the record is located, the user will point to and double-click on that record to access the **Equipment** window illustrated on the next page.

By clicking on the **Options** command menu button, and selecting **New Equipment** from the displayed menu, an empty version of the following window will be displayed for the entry of the indicated information for the new equipment.

# Transit Agency - Equipment

## Equipment – Characteristics

When the user double-clicks on a given record in the Equipment list window illustrated on the previous page, the Equipment window illustrated below opens, having window layers for Characteristics and Condition. By default, the Characteristics layer is displayed.

The screenshot shows a software window titled "Equipment for: GOGEBIC COUNTY PUBLIC TRANSIT". It has two tabs: "Characteristics" (selected) and "Condition". Below the tabs is a toolbar with an "Options" button and a dropdown menu showing "nt Characteristics". The main area contains a form with the following fields:

|              |                               |                  |       |                  |            |
|--------------|-------------------------------|------------------|-------|------------------|------------|
| Serial #:    | jeie                          | Modl Num:        | 93939 | Type:            | COMPUTER E |
| Description: | TMS System Computer           |                  |       |                  |            |
| TA:          | GOGEBIC COUNTY PUBLIC TRANSIT |                  |       |                  |            |
| Mnfr Name:   |                               | Fed Grant Num:   |       | Purchase Amount: |            |
| Status:      |                               | St Contract Num: |       | Year Purchased:  | 0000       |

This screen includes information such as contract number, purchase price, and a description of the equipment.

# Transit Agency - Equipment

## Equipment - Condition

Once the user has accessed the **Equipment** window, as described in the previous section, the user can access the **Condition** layer by clicking on the **Condition** layer tab. This action will cause the Condition layer to be displayed, as illustrated below.

Equipment for: GOGEBIC COUNTY PUBLIC TRANSIT

Characteristics Condition

Options nt Conditions

Evaluation Date: [Date Picker]

Current Age: [Text Box]

Design Service Life: [Text Box: 6]

Health Index: [Text Box: 0.0]

Remaining Service Life: [Text Box: 0]

Evaluated By: [Text Box]

Equipment Condition Comments: [Text Area]

This window allows the user to calculate the health index and remaining service life based on the age of the equipment. There is also a space to make comments regarding the physical condition of the equipment. You may view historical information by using the scroll bar on the **Evaluation Date** box and choosing one of the dates listed.

## **Transit Agency – Facilities**

Last Chapter Update: 12/8/98

# Transit Agency - Facilities

## Overview

This chapter will focus on the use of the **Facilities** layer in the Transit Agency window. We request that you enter your facilities into the facility inventory.

## Accessing Facility Information

To access transit agency facility information, the user must first start PTMS as discussed starting on page 2.3. Then the user must locate the record for the transit agency for which facility information is desired as discussed starting on page 3.2. Once the correct record is located, the user will point to and double-click on the desired agency in the **Open TA** window. As a result of this action the **Transit** window opens for the selected agency. Note that in the illustration below, it is the **GOGEBIC COUNTY PUBLIC TRANSIT** window.

The screenshot shows a software window titled "GOGEBIC COUNTY PUBLIC TRANSIT". It has a menu bar with "Profile", "Application", "Vehicles", "Equipment", "Facilities", and "Operating Report". Below the menu bar is a tab labeled "Options" and a section titled "Characteristics".

The "TA Characteristics" section contains the following fields:

- TA Name: GOGEBIC COUNTY PUBLIC TRANSIT
- Mr. / Ms.: Mr. First: James Last: Mildren
- Title: Manager
- Contact Name: MR. JAMES MILDREN TA ID: 386004851
- Profile: M-F 6 A.M. - 6 P.M.
- Address: 235 E. MCLEOD AVENUE  
IRONWOOD, MI 49938
- Phone Number: (906) 932-2523 Fax Number: (906) 932-1493
- E-Mail: bluebus@gogebic.cc.mi.us

Below the "TA Characteristics" section is a "Legislative Information" section with three sub-sections:

- House Districts: 110
- Senate Districts: 38
- Legislators: Sen. Donald Koivisto (D)  
Rep. Paul Tesanovich (D)

The status bar at the bottom left says "Ready" and the bottom right shows the date and time "7/20/98 1:00 PM".

The **Profile** layer is active by default. To access the facility information the user will now click on the **Facilities** layer tab to the right of the Profile tab. The Facilities layer will then become visible, as illustrated on the next page.

# Transit Agency - Facilities

| Facility ID | Facility Name | Address | HI | RSL |
|-------------|---------------|---------|----|-----|
| 34          | Garage        |         | 17 | 15  |

You will see a list of all the facilities used by the selected agency.

Note that the list in the table form section of the window can be sorted as described in Chapter 2. This may help the user locate the desired facility record (row), which the user must do to access and edit existing information. Once the record is located, the user will point to and double-click on that record to access the **Facility** window illustrated on the next page.

# Transit Agency - Facilities

Facility for GOGEBIC COUNTY PUBLIC TRANSIT: Garage

Characteristics      Condition      Improvements

Options → Characteristics

Facility Name: Garage      Agency: GOGEBIC COUNTY PUBLIC TRANSIT

Address :      City, Zip Code:

Facility Type : ☐ Bus Shelter

| Bus Shelter   | Other   |
|---------------|---|
| Quantity:<br> | <input type="checkbox"/> Administrative <input type="checkbox"/> Transfer Center<br><input type="checkbox"/> Maintenance <input type="checkbox"/> Intermodal<br><input type="checkbox"/> Operations/Dispatch <input type="checkbox"/> Storage<br><input type="checkbox"/> Other |

Structure Type: BLOCK      Federal Grant No.:      Original Purchase Price: 0.00

Sq. Footage :      State Contract No.:      Completion Date: 02/03/1995

Handicap Accessible : ☐      Owned By:

By clicking on the **Options** command menu button, and selecting **New Facility** from the displayed menu, an empty version of the following window will be displayed for the entry of the indicated information for the new facility.

# Transit Agency - Facilities

## Facility – Characteristics

When the user double-clicks on a given record in the Facility list window illustrated on the previous page, the Facility window illustrated below opens, having window layers for Characteristics, Condition, and Improvements. By default, the Characteristics layer is displayed.

The screenshot shows a software window titled "Facility for GOGEBIC COUNTY PUBLIC TRANSIT: Garage". It has three tabs: "Characteristics", "Condition", and "Improvements". The "Characteristics" tab is active. Below the tabs is a section labeled "Options" with a dropdown menu set to "characteristics". The main form area contains the following fields and controls:

- Facility Name: Garage
- Agency: GOGEBIC COUNTY PUBLIC TRANSIT
- Address:
- City, Zip Code:
- Facility Type: ☐ Bus Shelter
- Bus Shelter section:
  - Quantity:
- Other section:
  - ☐ Administrative
  - ☐ Maintenance
  - ☐ Operations/Dispatch
  - ☐ Other
  - ☐ Transfer Center
  - ☐ Intermodal
  - ☐ Storage
- Structure Type: BLOCK (dropdown)
- Federal Grant No.:
- Original Purchase Price: 0.00
- Sq. Footage:
- State Contract No.:
- Completion Date: 02/03/1995
- Handicap Accessible: ☐
- Owned By:

This window, which gives the location of the facility, also contains what it is used for, details regarding the structure, and financial information such as grant numbers and cost.

# Transit Agency - Facilities

## Facility – Condition

Once the user has accessed the **Facility** window, as described in the previous section, the user can access the **Condition** layer by clicking on the **Condition** layer tab. This action will cause the Condition layer to be displayed, as illustrated below.

The screenshot shows a software window titled "Facility for GOGEBIC COUNTY PUBLIC TRANSIT: Garage". It has three tabs: "Characteristics", "Condition" (which is selected), and "Improvements". Below the tabs is an "Options" dropdown menu. The main area of the "Condition" tab contains the following fields:

- Evaluation Date:** A date picker showing "02/03/1998".
- 1 (Good) - 100 (Poor):** A scale indicator.
- Structural Evaluation Score:** A text box with the value "20".
- Functional Evaluation Score:** A text box with the value "20".
- Total Condition Score:** A text box with the value "40".
- Design Service Life:** A text box with the value "20".
- Current Age:** A text box with the value "3".
- Health Index:** A text box with the value "17.0".
- Remaining Service Life:** A text box with the value "15".
- Evaluated By:** An empty text box.
- Last Modified Date:** A text box showing "02/03/1998".
- Facility Condition Comments:** A large empty text area.

This window allows the user to give the facility a structural evaluation score and a financial evaluation score, and to make general comments about the facility. The design service life, age, health index, and remaining service life are automatically calculated. Past evaluations can be viewed by using the scroll bar on the **Evaluation Date** box and selecting a previous date.

To enter a new evaluation click on the **Options** command menu button and select **New Condition** from the displayed menu. A blank condition form will be displayed for the entry of the new evaluation.

# Transit Agency - Facilities

## Facility – Improvements

Once the user has accessed the **Facility** window, as described in the Characteristics section, the user can access the **Improvements** layer by clicking on the **Improvements** layer tab. This action will cause the Improvements layer to be displayed, as illustrated below.

The screenshot shows a software window titled "Facility for GOGEBIC COUNTY PUBLIC TRANSIT: Garage". It has three tabs: "Characteristics", "Condition", and "Improvements". The "Improvements" tab is selected. Below the tabs is a section labeled "Options" with a dropdown menu set to "improvements". Inside this section, there are input fields for "Type" (containing "ENV RENOV"), "Date" (containing "07/20/1998"), and "Amount" (containing "0.00"). Below these is a "Description:" label followed by a large text area. At the bottom of the window is a table with the following headers: "Type", "Date", "Amount", and "Description". The table is currently empty. A horizontal scrollbar is visible below the table.

| Type | Date | Amount | Description |
|------|------|--------|-------------|
|------|------|--------|-------------|

This window allows users to record improvements that have been done to the facility and view a history of all improvements.

## **Transit Agency – Operating Assistance Report**

Last Chapter Update: 12/8/98

# Transit Agency - Operating Assistance Report

## Overview

This chapter will focus on the use of the **Operating Report layer** in the Transit Agency window. This window provides the user Access to all operating reports that have been submitted by this agency (including all annual operating requests (budgets), quarterly operating assistance reports, and annual reconciled and audited reports). Users can also create and submit new OARs from this window. Details of creating a new budgetary OAR associated with a new annual application are covered in the Application section. See page 5.21.

## Accessing Operating Assistance Report Information

To access transit agency operating assistance report information, the user must first start PTMS as discussed starting on page 2.3. Then the user must locate the record for the transit agency for which OAR information is desired as discussed starting on page 3.2. Once the correct record is located, the user will point to and double-click on the desired agency in the **Open TA** window. As a result of this action the **Transit** window opens for the selected agency. Note that in the illustration below, it is the **ISABELLA CO TRANSPORTATION COMMISSION** window.

**ISABELLA CO TRANSPORTATION COMMISSION**

| Profile | Application | Vehicles | Equipment | Facilities | Operating Report |
|---------|-------------|----------|-----------|------------|------------------|
|---------|-------------|----------|-----------|------------|------------------|

Options ▾ Characteristics

**TA Characteristics**

TA Name: ISABELLA CO TRANSPORTATION COMMISSION

Mr. / Ms. Ms. First: Jan Last: Bauman

Title: General Manager

Contact Name: MS. JAN BAUMAN TA ID: 382161440

Profile: COUNTY-WIDE PUBLIC TRANSIT: SYSTEM OPERATING EVERY DAY EXCEPT MAJOR HOLIDAYS. DEMAND RESPONSE SERVICE IN MT. PLEASANT & ADJACENT AREAS. FLEXIBLE ROUTE SERVICE IN OUT COUNTY

Address: 4590 E. PICKARD  
MT. PLEASANT, MI 48858

Phone Number: (517) 773-2410 Fax Number: (517) 773-1873

E-Mail: ICTC@ARROWNET.COM

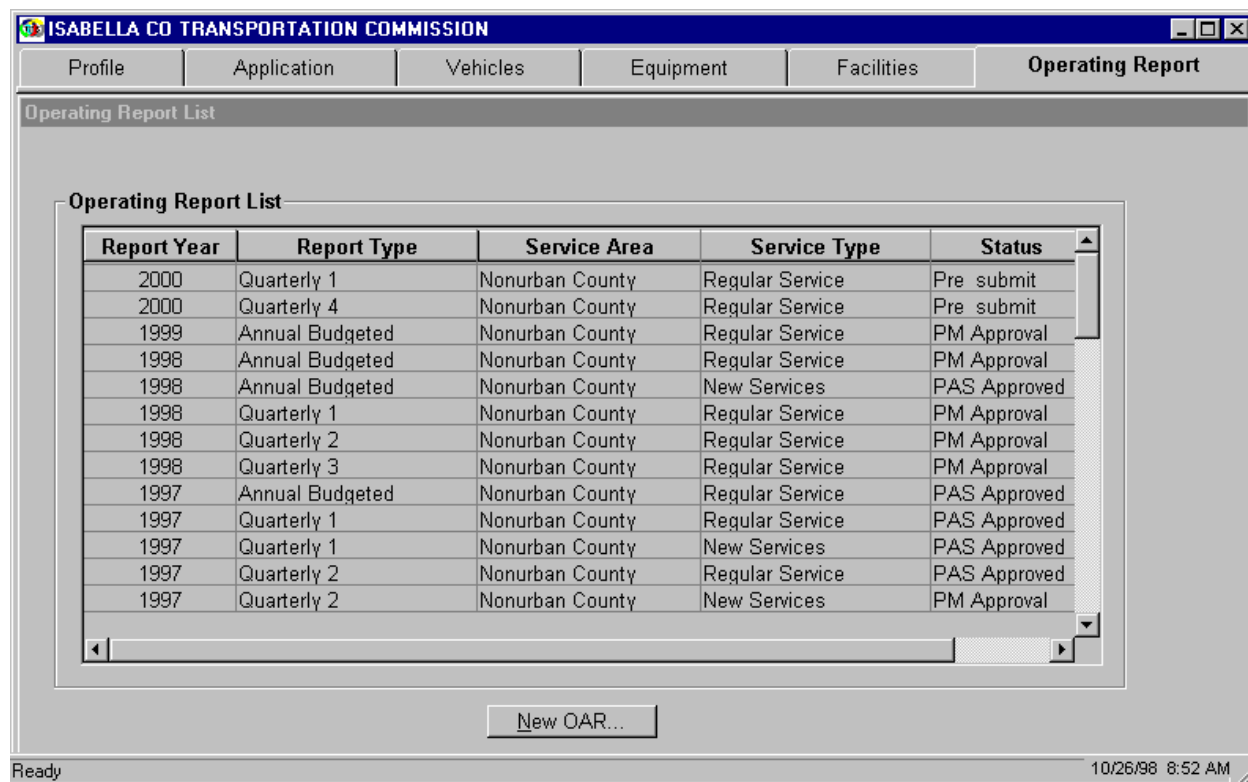
**Legislative Information**

| House Districts | Senate Districts | Legislators                                      |
|-----------------|------------------|--|
| 99              | 23               | Sen. Joanne Emmons (R)<br>Rep. James McBryde (R) |

Ready 10/26/98 8:50 AM

# Transit Agency - Operating Assistance Report

The **Profile** layer is active by default. To access the OAR information the user will now click on the **Operating Reports** layer tab at the right end of the window. The **Operating Report List** window will then become visible, as illustrated below.



To examine details of a given operating request, the user will locate it in this list, employing the scroll bars as required, and then double-clicking in the row of the desired request. As a result of this action the **OAR** window is displayed, as illustrated on the next page.

Note that the list in the table form section of the window can be sorted as described in Chapter 2. This may help the user locate the desired record (row), which the user must do to access and edit existing information.

# Transit Agency - Operating Assistance Report

The screenshot shows a software window titled "Transit Agency - Operating Assistance Report". It features three tabs at the top: "Summary", "Financials", and "Non-Financials". The "Summary" tab is currently selected. Below the tabs, there is a "Summary Details" section. This section contains several input fields and a text area:

- Service Area :** A text box containing "Nonurban Cnty".
- Service Type :** A text box containing "Regular Service".
- Report Fiscal Year :** An empty text box.
- Report Type :** A dropdown menu with a downward arrow.
- Begin Date :** An empty text box.
- End Date :** An empty text box.
- Comments :** A large empty text area.
- Status :** A dropdown menu with "Pre\_submit" selected.
- Initial Submit Date:** A text box containing "00/00/0000".

At the bottom of the window, there are three buttons: "Save", "Print", and "Close".

The **OAR** window is a multi-layered window, and by default the **Summary** layer is active when it is opened, as in the illustration above.

In this window the user can view summary details of the selected operating report, and edit the report if in a **Pre\_submit** status.

Any changes made to a report can be saved by selecting the **Save** button, and this window can be closed by selecting the **Close** button, both at the bottom of this window. The function of the **Print** button will be covered on page 9.9.

By clicking on the **Financials** layer tab, the Revenue window is displayed, as illustrated on the next page.

# Transit Agency - Operating Assistance Report

The screenshot shows a software window titled "Transit Agency - Operating Assistance Report". It has three tabs: "Summary", "Financials", and "Non-Financials". The "Financials" tab is selected. Inside the "Financials" tab, there is a sub-section titled "Revenue" in red text. To the right of the "Revenue" section is a button labeled "Financial Codes". Below the "Revenue" section is a table with four columns: "Code", "Description", "Amount DR", and "Comments". The table contains three rows of data:

| Code  | Description                         | Amount DR | Comments |
|-------|-------------------------------------|-----------|----------|
| 40100 | Passenger Fares for Transit Service | 10000     |          |
| 40200 | Special Transit Fares               | 20000     |          |
| 40400 | Freight Tariffs / Package Delivery  | 9000      |          |

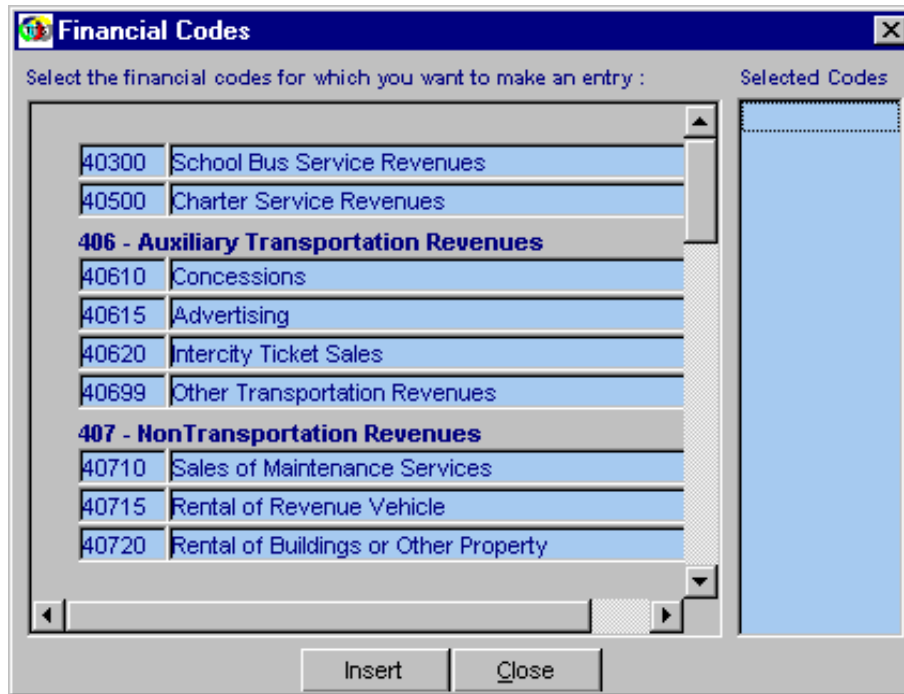
At the bottom right of the window, there is a button labeled ">> Expense >>".

In this window the user can view/edit revenue schedule details of the selected operating request.

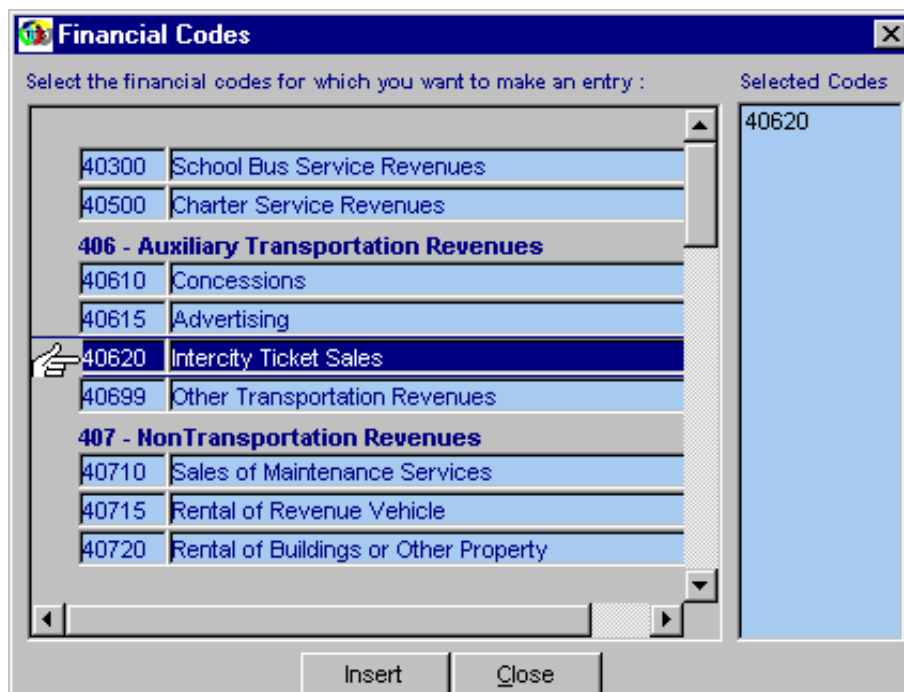
Note that the format of this layer will depend upon the given transit agency, the service area, and the service type. The illustration above is for Nonurban County, Regular Service. Though the format and content may vary, the functionality is the same for all formats.

Note that which rows are displayed in this window will depend upon the rows that contained data when the report was saved. If a user needs to add a row that is not present, it can be added through clicking on the Financial Codes button to display the Financial Codes window, as illustrated at the top of the next page.

# Transit Agency - Operating Assistance Report



The user will locate the desired code by using the vertical scroll bar. When the desired row is located, the user will point to it and double-click to place the code in the **Selected Codes** section at the right of the window, as illustrated below.



# Transit Agency - Operating Assistance Report

When all codes to be added have been collected in the Selected codes list, the user will click the **Insert** button at the bottom of the window. This action will close the Financial Codes window, and return the user to the Financials layer with the new code lines inserted.

**NOTE:** The user must enter the desired data in the new code lines *prior* to saving the window. When the Save is performed, any lines with data fields that are empty, or contain only zeroes, are eliminated.

By clicking on the **Expense** button at the lower right of the window, the Expense page is displayed,

| Code  | Description                   | Operations DR | Maintenance | General Admin DR | Total | Comments |
|-------|-------------------------------|---------------|-------------|------------------|-------|----------|
| 50101 | Operators' Salaries & Wages   | 1000          | 500         |                  | 1,500 |          |
| 50102 | Other Salaries & Wages        | 2000          | 600         |                  | 2,600 |          |
| 50103 | Dispatchers' Salaries & Wages | 3000          | 700         |                  | 3,700 |          |
| 50200 | Fringe Benefits               | 400           | 800         |                  | 1,200 |          |
| 50302 | Advertising Fees              | 500           | 900         |                  | 1,400 |          |

as illustrated below.

If the user needs to add additional codes that are not present, the user will follow the same Financial Codes process discussed starting on page 5.

# Transit Agency - Operating Assistance Report

By clicking on the **Non-Financials** layer tab, the window illustrated below is displayed.

The screenshot shows a software window titled "Non-Financials" with three tabs: "Summary", "Financials", and "Non-Financials". The "Non-Financials" tab is active. The window contains three sections: "Public Service", "Vehicle", and "Miscellaneous". Each section has a table of data.

**Public Service**

| Code | Description   | Weekday DR | Saturday DR | Sunday DR | Total |
|------|---------------|------------|-------------|-----------|-------|
| 610  | Vehicle Hours | 100        |             |           | 100   |
| 611  | Vehicle Miles | 20         |             |           | 20    |

**Vehicle**

| Code | Description              | Quantity |
|------|--------------------------|----------|
| 653  | Total Line-Haul Vehicles | 100      |

**Miscellaneous**

| Code | Description                            | Quantity DR | Explanation |
|------|--|-------------|-------------|
| 601  | Number of Routes (Line Haul Only)      | 100         |             |
| 602  | Number of Route Miles (Line Haul Only) | 50          |             |

In this window the user can view/edit non-financial details of the selected operating request.

Note that the format of this layer will depend upon the given transit agency, the service area, and the service type. The illustration above is for Nonurban County, Regular Service. Though the format and content may vary, the functionality is the same for all formats.

Note that which rows are displayed in this window will depend upon the rows that contained data when the report was saved. If a user requires a row that is not present, it can be added through the use of the **Financial Codes** button at the upper right of the window. See the explanation of the Financial Codes button starting on page 9.5.

When done with the **OAR** window, the user can close it and return to the **Operating Report List** window.

# Transit Agency - Operating Assistance Report

Note that in both the Financials and Non-Financials layers, there is no total by column at the bottom of the windows. To observe totaling and subtotaling relating to these figures, the user should view the corresponding reports. Selecting the **Print** button at the bottom of the window will cause the Print dialog box to be displayed, as illustrated below.



The user will select desired report by clicking on it, and then view the report in print preview by selecting the **View Report** button. An example of a previewed report with totals displayed appears below. To print the previewed report, click on the Print button at the bottom of the window.

**Operating Assistance Report**

ISABELLA CO TRANSPORTATION COMMISSION  
Nonurban County  
Regular Service  
Annual Budgeted  
1997

REVENUE SCHEDULE

| Code   | Description                                    | Amount    |
|--|--|-----------|
| <b>411 : State Cash Grants &amp; Reimbursements</b>  |  |           |
| 41199  | Other Ineligible State Grants & Reimbursements | \$805,450 |
| <b>413 : Federal Cash Grants &amp; Reimbursement</b> |  |           |
| 41301  | 49 USC Section 5311 (Section 18)               | \$178,971 |
| <b>414 : Interest Income</b>                         |  |           |
| 41400  | Interest Income                                | \$12,000  |
| <b>Total Revenues : \$1,833,421</b>                  |  |           |
| <b>Total Eligible Revenues : \$1,027,971</b>         |  |           |

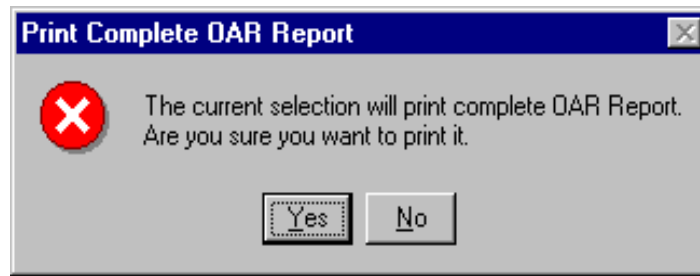
Print Close

# Transit Agency - Operating Assistance Report

---

Note that the Complete OAR report cannot be previewed without printing, and when selected the button will change to **Print Report**.

On clicking the Print Report button, a message box will be displayed confirming the users desire to print the report, as illustrated below.



On selecting the **Yes** button in that window, the complete report will print.

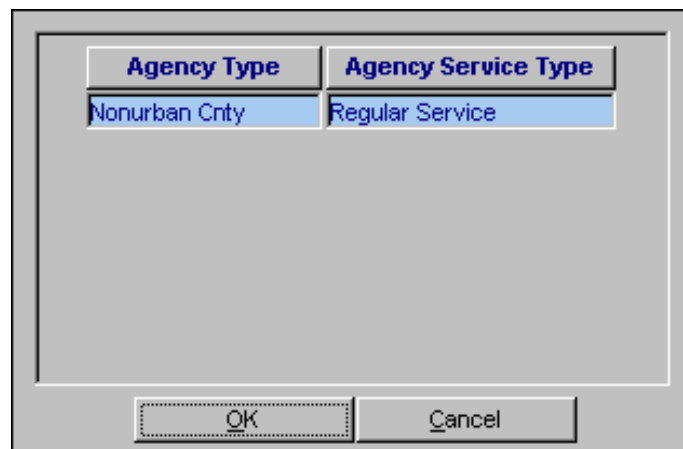
# Transit Agency - Operating Assistance Report

---

## New Operating Assistance Report

To create a new Operating Assistance Report, the user must first access the **Operating Request List** window, as described starting on page 9.3.

Once in that window, the user will click on the **New OAR** button at the bottom of the window. As a result the user will be prompted to indicate which service the new request is for, as illustrated below.



The screenshot shows a dialog box with a table at the top. The table has two columns: 'Agency Type' and 'Agency Service Type'. The first row contains 'Nonurban Crty' and 'Regular Service'. Below the table is a large empty rectangular area. At the bottom of the dialog box are two buttons: 'OK' and 'Cancel'.

| Agency Type   | Agency Service Type |
|---------------|---------------------|
| Nonurban Crty | Regular Service     |

OK Cancel

The user will select the desired Service Area/Service Type by clicking in the appropriate row, and select the **OK** button. Note that even if only one row is displayed, as illustrated above, the user must still click in the row prior to clicking **OK**.

As a result a **New Operating Assistance report** window is opened, with the **Summary** layer displayed, as illustrated on the next page.

# Transit Agency - Operating Assistance Report

The screenshot shows a software window titled "Transit Agency - Operating Assistance Report" with three tabs: "Summary", "Financials", and "Non-Financials". The "Summary" tab is active, displaying a "Summary Details" section. This section contains several input fields: "Service Area" (text box with "Nonurban Cnty"), "Service Type" (text box with "Regular Service"), "Report Fiscal Year" (two separate text boxes), "Report Type" (dropdown menu), "Begin Date" (text box), "End Date" (text box), "Comments" (large text area), "Status" (dropdown menu with "Pre\_submit"), and "Initial Submit Date" (text box with "00/00/0000").

To set up a new report the user will fill in the **Report Fiscal Year**, **Report Type**, and **Comments** fields. Entering this information will trigger automatic population of the **Begin Date** and **End Date** fields. Information is stored by clicking the Save button at the bottom of the window.

Note that the format of all layers will depend upon the given transit agency, the service area, and the service type. The illustration above is for Nonurban County, Regular Service. Though the format and content may vary, the functionality is the same for all formats.

The user can now access the **Financials**, and **Non-Financials** layers as appropriate to enter necessary information. Note that the Financials layer contains pages for Revenue and Expense. The user should save all changes in each layer before changing layers. Once a page has been saved, only those rows containing data (no blanks or zeroes) will appear on the screen.

If the user requires a row that is not present, it can be added through the use of the Financial Codes button at the upper right of the window. See page 9.5 for details. To see totals for financial and non-financial data the user will need to view reports using the Print button. See page 9.9 for more details.

The default status for a new Operating Request is **Pre submit**. Once the report is complete the Transit Agency can submit the report by changing the Status to **Submit** and saving. The date the report is saved in Submit status for the first time will be recorded in the Initial Submit Date field. This date field will not change on resubmittal. If a resubmission of the OAR is required, your project manager must change the status to **Resubmit**, which will enable the Transit Agency to revise the report and **submit** again. Other possible statuses are **PAS Approved**, **PAS Denied**, and **PM Approval**. By monitoring the status of the OAR, the transit agency can follow its progress.

## **Statewide Vehicle List**

Last Chapter Update: 12/8/98

# Statewide Vehicle List

## Overview

The **Statewide Vehicle List** in PTMS allows users to quickly view a list of all vehicles from all transit agencies across the state. This list can be filtered and sorted to assist the user in locating a specific vehicle, and once found, the user can open data windows that provide information concerning the vehicle's characteristics, condition, financials, and history.

## Accessing the Statewide Vehicle List

To access the list, the user must first start PTMS, as described starting on page 2.3. If the **Public Transportation Gateway** window is displayed, the user can they select **View Vehicle List** in the window, and click **OK**.

If the Gateway window is not displayed, the user can select **File/ Open/Vehicle** from the PTMS Main Menu window.

As a result of either of the above actions, the **Open Vehicle** window is displayed, as illustrated

The screenshot shows the 'Open Vehicle' window. It features a toolbar with 'State Wide' (selected), 'Urban', 'Non Urban', and 'Custom TA List'. Below the toolbar are three sections: 'Vehicle Category' (Small Bus, Medium Bus, Heavy Duty Small Bus, Heavy Duty Large Bus, Trolley, Unknown), 'Improvement Type' (None, Rehab (5yr), Rehab (7yr), Remanufacture), and 'Purchase Reason' (Replacement, Expansion, Unknown). A 'Selection' button with an 'Apply' sub-button is on the right. At the bottom is a table with columns: TA Name, Vehicle Id, State 71, Status, Type, Seats, Lift Sts, Model Yr, Miles, HI, RSL.

| TA Name | Vehicle Id | State 71 | Status | Type | Seats | Lift Sts | Model Yr | Miles | HI | RSL |
|---------|------------|----------|--------|------|-------|----------|----------|-------|----|-----|
|---------|------------|----------|--------|------|-------|----------|----------|-------|----|-----|

below.

# Statewide Vehicle List

---

Since there may be a large number of records to examine, PTMS provides a number of functions to assist the user in locating the desired record. The use of these functions will be covered in the following sections.

## Filtering

Filtering is the process of specifying certain criteria that the vehicle records need to match in order to be displayed in the list at the bottom of the **Open Vehicle** window.

The lower section of the window will be in table format, with multiple rows and columns. Each row represents one vehicle, and each column represents one field of information within the vehicle record. To access information on a given vehicle, the user will need to locate and select the desired record in this table. The user can employ the vertical scroll bar provided to move through the list of records. By filtering the list of vehicles, fewer vehicles will appear in the list. With fewer vehicles in the list, the user will be able to locate the desired record with less effort.

The top of the **Open Vehicle** window is where the filtering options are located. The **State Wide/Urban/Non Urban** sections and the **Vehicle Category, Improvement Type, and Purchase Reason** sections are where criteria are indicated as check box fields.

The presence of a mark in a check box indicated that the table section of the window will display vehicle records meeting that criteria. Note in the diagram on the previous page that all the boxes are checked, so records of all types will be retrieved. Removing a mark from a check box will cause transit agency records of that type not to be displayed. For example, if the mark was removed from the **Metro** box, then vehicles from the Urban/Metro transit agencies will not be displayed in the list.

The user may remove and add a mark to a check box by clicking in the box, or on the field name associated with the box. So to remove the mark In the **Metro** box, the user will click in that box, or on the word **Metro**. The same action will place a mark in an empty box. To remove or add groups of labels, the user can click on the section label names, which are also command buttons. By clicking on **State Wide**, marks will be removed or added to all check boxes in the **Urban** and **Non Urban** sections.. The user can also click on **Urban** or **Non Urban** to add or remove all marks in those sections respectively. There are no buttons for the **Vehicle Category, Improvement Type, and Purchase Reason** sections. Each mark must be removed or added individually.

Once all changes in marked boxes have been made, the user will need to click on the **Apply** button, in the **Selection** group, at the right of the top section of the **Open Vehicle** window. This action causes PTMS to refresh the list of displayed vehicle records so that the ones meeting the marked criteria are displayed.

# Statewide Vehicle List

An illustration of the **Open Vehicle** window with retrieved records appears below.

The screenshot shows the 'Open Vehicle' window with various filter tabs and a table of vehicle records.

**Filters:**

- State Wide:** ☒ State Wide, ☐ Custom TA List
- Urban:** ☒ Metro, ☐ Medium, ☐ Large, ☐ Small
- Non Urban:** ☐ County, ☐ Township, ☐ City
- Vehicle Category:** ☐ Small Bus, ☐ Medium Bus, ☐ Heavy Duty Small Bus, ☒ Heavy Duty Large Bus, ☐ Trolley, ☐ Unknown
- Improvement Type:** ☒ None, ☐ Rehab (5yr), ☐ Rehab (7yr), ☐ Remanufacture
- Purchase Reason:** ☐ Replacement, ☐ Expansion, ☒ Unknown

**Selection:**

| TA Name             | Vehicle Id      | State 71 | Status   | Type           | Seats | Lift Sts | Model Yr. | Miles   | HI | RSL |
|---------------------|-----------------|----------|----------|----------------|-------|----------|-----------|---------|----|-----|
| DIMONDALE (VEHICLE) | T7W603A612      |          | DMB SALE | BUS-LG HVY DTY | 36    |          | 1980      | 347,114 |    |     |
| DIMONDALE (VEHICLE) | 1GOYT76J4BV8117 |          | DMB SALE | BUS-LG HVY DTY | 36    |          | 1981      | 482,904 |    |     |
| SMART               | TH-8203259      |          | ASSIGNED | BUS-LG HVY DTY | 41    |          | 1978      | 676,972 |    |     |
| SMART               | T8H-203779      |          | ASSIGNED | BUS-LG HVY DTY | 44    |          | 1979      | 693,577 |    |     |
| SMART               | T8H-203786      |          | ASSIGNED | BUS-LG HVY DTY | 44    |          | 1979      | 690,819 |    |     |
| SMART               | T8H-203A1476    |          | ASSIGNED | BUS-LG HVY DTY | 44    |          | 1980      | 709,405 |    |     |
| SMART               | T8H-203A1478    |          | ASSIGNED | BUS-LG HVY DTY | 44    |          | 1980      | 670,974 |    |     |
| SMART               | 1GOYT82J1CV8204 |          | ASSIGNED | BUS-LG HVY DTY | 43    |          | 1982      | 651,774 |    |     |

By removing or adding marks as appropriate, the user can restrict the displayed vehicles to a smaller list that will be easier to search.

# Statewide Vehicle List

---

## Custom TA List

In certain cases a PTMS user may desire to view only a very particular set of vehicle records that the filtering process discussed on the previous page does not produce.

Starting on page 3.4 this manual discusses how to build a custom filter set of transit agencies. If such a list has been built for filtering transit agencies in the Open TA window, PTMS will allow users to view vehicle records associated with only the agencies in that custom TA list by selecting the **Custom TA List** check box at the upper right of the **State Wide** group.

To return to the full vehicle list the user can unmark the **Custom TA List** check box, set the desired criteria, and click on **Apply**.

## Sorting

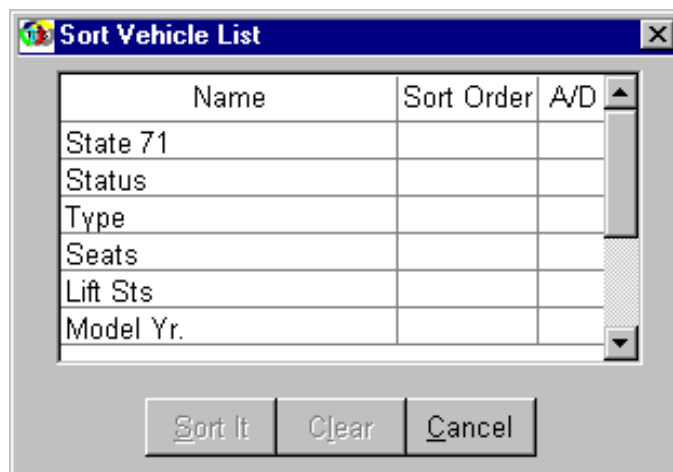
Even after filtering the vehicle records, there may still be a large number of records through which the user must search to locate the vehicle record for which information is desired. To assist in this search, PTMS provides the user the ability to sort the list of records by any displayed field, or by multiple fields. Sorting the records in a certain order may assist the user in quickly locating the desired record.

To sort the table section of the **Open Vehicle** window on one of the displayed fields, the user will begin by clicking anywhere in the column representing the field by which the table will be sorted. Then while pointing the mouse at this column, the user will press the right mouse button to activate the shortcut menu. From this menu the user will select the **Sort** command. As a result of this action the table will sort in ascending order by the selected column (field). To sort in descending order, the user will simply perform the identical operation again.

Note that any sorting performed is in effect only while the **Open Vehicle** window is open. Once the window is closed and reopened, the sort order will revert to its default setting.

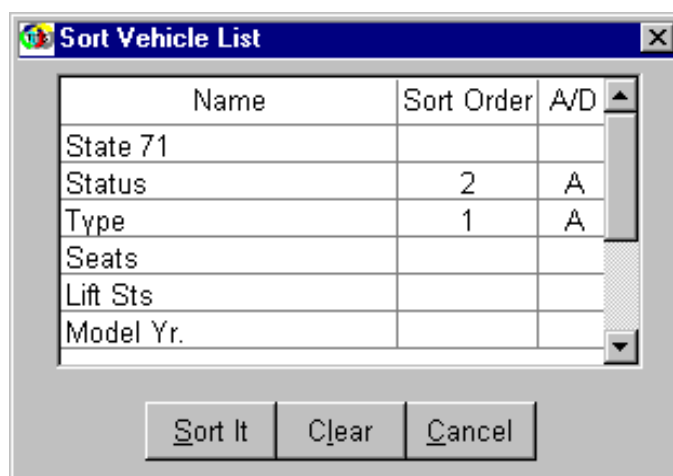
Another option available in the **Open Vehicle** window is the ability to sort by more than one field at once. This is called **Sort+**. To perform this multi-field sort, the user will display the shortcut menu as discussed earlier, and then select the **Sort+** command. As a result of this action the Sort window illustrated at the top of the next page is opened.

# Statewide Vehicle List



In the **Name** column will be the names of fields by which the table can be sorted. The **Sort Order** column indicates the priority sort order of the multiple sort fields selected. The **A/D** column indicates whether the sort order is to be ascending or descending for selected sort fields.

To select a field to sort by, the user simply clicks in the **Sort Order** column of the desired field. The first row clicked in becomes the number 1 priority sort field, the second 2, and so on. Each sort field selected is set to ascending (A) by default, but by clicking in the **A/D** column the user can change



the A to D (descending). The diagram below illustrates a two key sort on Type and Status. Type is the primary sort key, and Status secondary. Type and Status will sort ascending.

Once the sort keys are set up as desired, the user will click on the **Sort It** button to close this window and have the table sorted as desired. The **Clear** button cleans out all currently indicated sort key information. The **Cancel** button closes this window without performing any sort indicated.

# Statewide Vehicle List

## Accessing Vehicle Information

Once the user has employed filtering, sorting, and scrolling as required to locate the desired vehicle record, the user can now access more information concerning the vehicle by pointing to the vehicle record (row) and double-clicking the mouse. As a result of this action the **Vehicle** window is opened as illustrated below, with the **Characteristics** window layer active.

The screenshot shows a window titled "Vehicle: T7W603A612" with four tabs: "Characteristics", "Condition", "Financials", and "History". The "Characteristics" tab is active. Inside the tab, there is a "Status" section with a "Vehicle ID:" label and a text box containing "T7W603A612". Below this is a table with the following data:

| Status   | Begin Date | End Date   | Miles   | TA                               |
|----------|------------|------------|---------|----------------------------------|
| ASSIGNED | 01/01/1997 | 00/00/0000 | 347,114 | JACKSON TRANSPORTATION AUTHORITY |

The table is contained within a scrollable area with horizontal and vertical scroll bars.

When using double-clicks on a given record in the **Vehicle** list window illustrated on the previous page, the Vehicle window illustrated below opens, having window layers for **Characteristics**, **Condition**, **Financials**, and **History**. By default, the Characteristics layer is displayed.

This window provides information concerning the vehicle ID, specifications, and Status. This window is read-only for most users.

# Statewide Vehicle List

## Vehicle – Condition

Once the user has accessed the **Vehicle** window, as described in the previous section, the user can access the Condition layer by clicking on the **Condition** layer tab. This action will cause the Condition layer to be displayed, as illustrated below.

The screenshot shows a software window titled "Vehicle: T7W603A612" with four tabs: "Characteristics", "Condition" (selected), "Financials", and "History". Below the tabs is a sub-header "Options" with a dropdown menu showing "Vehicle Condition". The main content area is titled "Vehicle Condition" and contains the following fields:

- Evaluation Date: 10/01/1998 (dropdown menu)
- Rating (1:Good - 10:Poor):
  - Engine: 0
  - Body Interior: 0
  - Structure: 0
  - Lift: 0
  - Drive-Train: 0
  - Body Exterior: 0
  - Suspension/Steering: 0
  - Safety Systems: 0
  - Electrical: 0
  - AC/Heating: 0
  - Total Score: 0
- Maint. Hrs (Last 12 Months):
  - Preventive: 0
  - All Other: 0
  - Total: 0
- Total Miles: [empty text box]
- Remaining Service Life (RSL): 42
- Evaluated By: [empty text box]
- Last Modification Date: 07/20/1998
- Health Index (HI): 30.0
- Comments: [empty text box]

This screen stores the annual inspection information.

The condition ratings were made part of the TMS so we (PTD) could eventually include them in a formula, along with age and mileage, to create the "Health Index (HI) and Remaining Service Life (RSL) of a vehicle. The initial HI and RSL formulas are included in the appendix of this User's Guide. We will be collecting condition data over the next couple of years with the sole purpose of testing (and possibly changing) our HI and RSL formulas and determining how they can be used in replacement criteria. For at least the next two years we will be using the same replacement criteria as in the past (age and miles). Using the scroll bar on the evaluation date box you can choose other years and view the condition ratings assigned that year.

# Statewide Vehicle List

## Vehicle – Financials

Once the user has accessed the **Vehicle** window, as described in the previous section, the user can access the **Financials** layer by clicking on the **Financials** layer tab. This action will cause the Financials layer to be displayed, as illustrated below.

Vehicle: T7W603A612

Characteristics   Condition   **Financials**   History

Options ▾ Vehicle Financials

**Purchase Information**

PO Number:  Purchase Cost:   
Contract Number:  Program:   
Federal Grant No.:  Purchase Reason:   
Delivery Date:  Delivery Miles:

**Improvement**

Type:  Cost:  Date:   
Description:

**Improvement History**

| Type | Date | Cost | Vehicle Improvement Description |
|------|------|------|---------------------------------|
|      |      |      |                                 |

This window gives you purchase information (grant number, purchase price, etc.) and improvement information (rehab, remanufacture, etc.) with a history of the improvements visible in the history box. Improvements will be entered either by you or MDOT personnel, depending on what type of funds were used for the improvement.

# Statewide Vehicle List

## Vehicle – History

Once the user has accessed the Vehicle window, as described in the previous section, the user can access the **History** layer by clicking on the **History** layer tab. This action will cause the History layer to be displayed, as illustrated below.

Vehicle: T7W603A612

Characteristics Condition Financials History

**Status**

Vehicle ID: T7W603A612

| Status   | Begin Date | End Date   | Miles   | TA                               |
|----------|------------|------------|---------|----------------------------------|
| ASSIGNED | 01/01/1997 | 00/00/0000 | 347,114 | JACKSON TRANSPORTATION AUTHORITY |

This window gives the user information regarding where the vehicle has been, and the dates when it was moved.

## **Performance Measures**

Last Chapter Update: 12/8/98

# Performance Measures

---

## Overview

**Note:** All Performance Measures are currently under construction due to the recent changes made to the PTMS financial database. The Financial layer is expected to be available in mid-December, 1998. Other layers will be available as changes are completed.

Within PTMS a number of transit performance indicators are calculated from the financial and non-financial data submitted in the Operating Assistance Reports. The indicators are separated into three groups: Financial, Service Operations, and Fleet Utilization. This chapter will concentrate on the access and use of these measures, including filtering and retrieval, use of ranges, and graphing.

For six (6) of the indicators, standards have been established for each transit agency type. These standards set “normal” ranges of performance for each of the six. They are:

- Farebox as a percent of cost (farebox recovery ratio)
- Cost per passenger
- Passengers per vehicle hour
- Passengers per vehicle mile
- Cost per vehicle mile
- Cost per vehicle hour

More standards and ranges will be available in future releases of the PTMS.

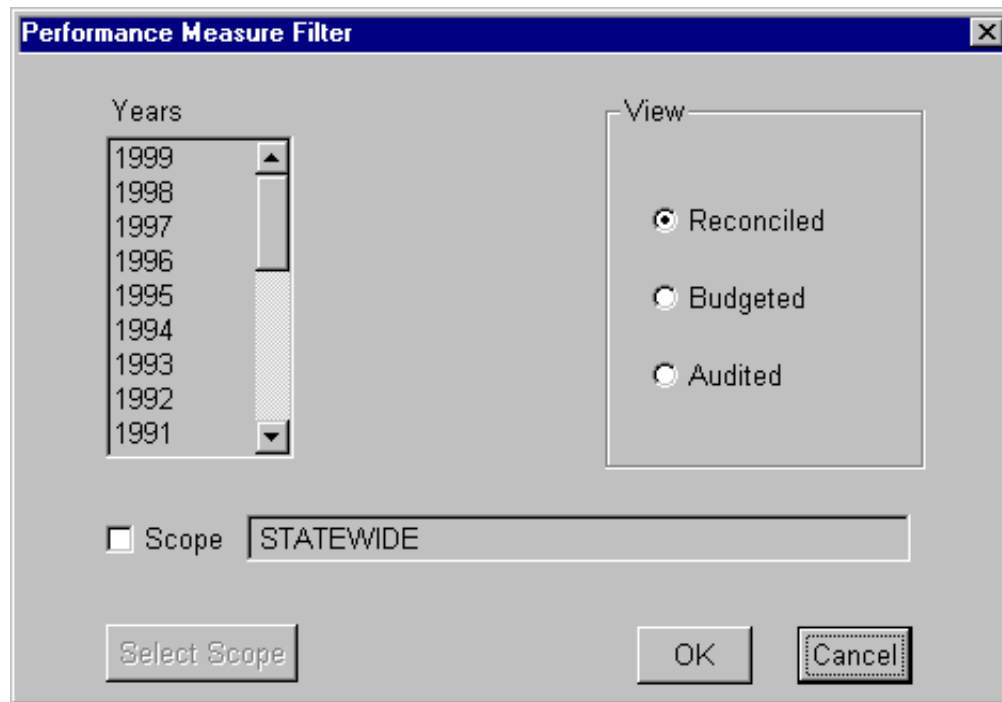
## Accessing Performance Measures

To access the transit performance measures, the user will first start PTMS as discussed starting on page 2.3. If the **Public Transportation Gateway** window is displayed, the user can click on **Cancel** to close that window.

Once in the PTMS Main Menu window, the user can access the performance measures by selecting **Tools | Performance Measures** from the menu bar. As a result of this action the **Performance Measure Filter** window is displayed, as illustrated on the next page.

This window allows the user to control which records will be used in calculating the performance measures. The user has three areas in which filter criteria can be selected, **Years**, **View**, and **Scope**. The user can click on a year to select or deselect that year. More than one year may be selected. The default selection in the **View** option group is **Reconciled**, but the user can change that to **Budgeted** or **Audited**.

# Performance Measures



The dialog box is titled "Performance Measure Filter". It contains a "Years" list box with years from 1991 to 1999. The "View" section has three radio buttons: "Reconciled" (selected), "Budgeted", and "Audited". There is a "Scope" checkbox (unchecked) and a text field containing "STATEWIDE". At the bottom are buttons for "Select Scope", "OK", and "Cancel".

| Years |
|-------|
| 1999  |
| 1998  |
| 1997  |
| 1996  |
| 1995  |
| 1994  |
| 1993  |
| 1992  |
| 1991  |

View

☒ Reconciled

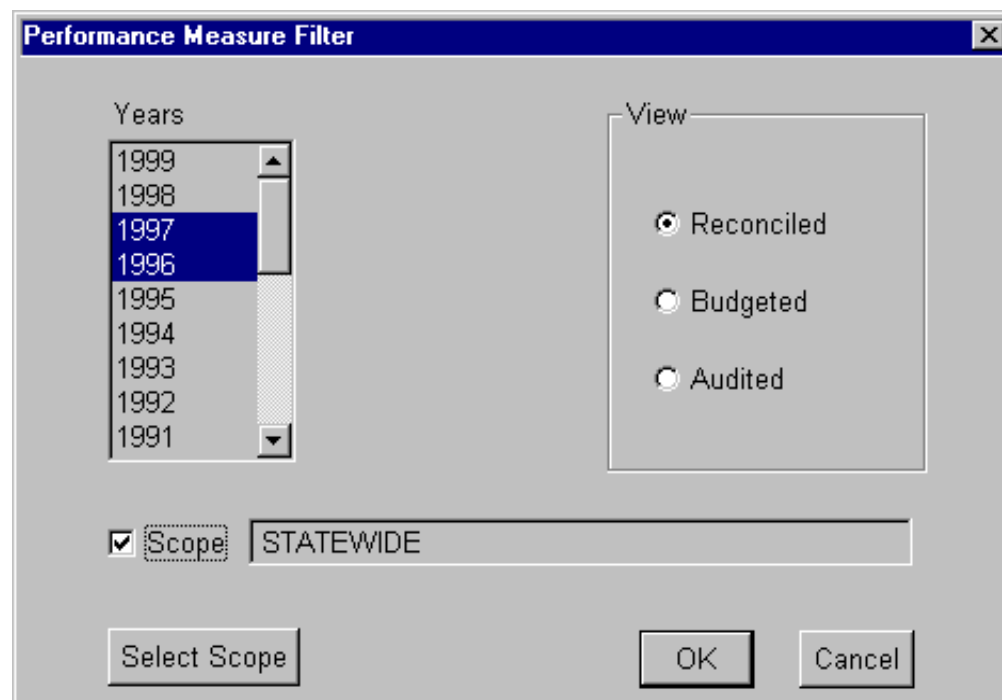
☐ Budgeted

☐ Audited

☐ Scope STATEWIDE

Select Scope OK Cancel

If the user wishes to specify a scope of either a transit agency type, or a specific transit agency, the user will place a mark in the **Scope** check box, which will activate the **Select Scope** command button, as illustrated below. Also note the selected years.



The dialog box is titled "Performance Measure Filter". It contains a "Years" list box with years from 1991 to 1999. The "View" section has three radio buttons: "Reconciled" (selected), "Budgeted", and "Audited". There is a "Scope" checkbox (checked) and a text field containing "STATEWIDE". At the bottom are buttons for "Select Scope", "OK", and "Cancel".

| Years |
|-------|
| 1999  |
| 1998  |
| 1997  |
| 1996  |
| 1995  |
| 1994  |
| 1993  |
| 1992  |
| 1991  |

View

☒ Reconciled

☐ Budgeted

☐ Audited

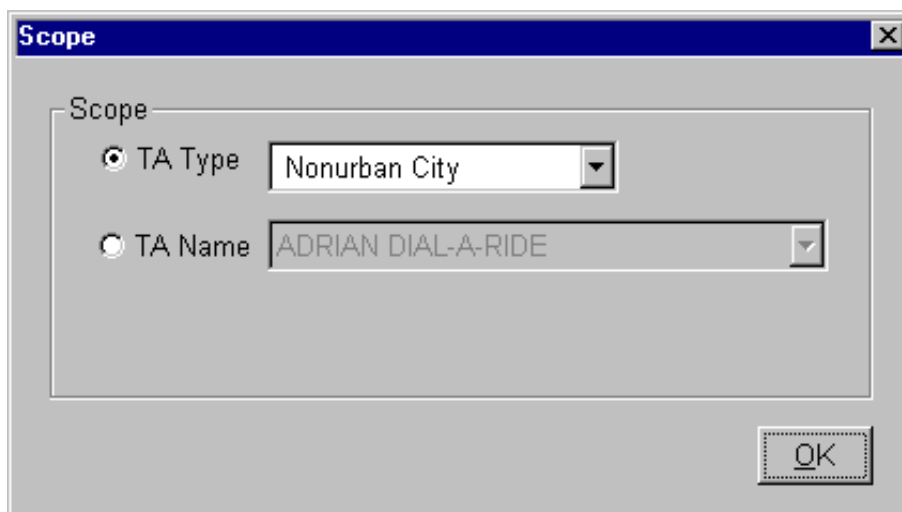
☒ Scope STATEWIDE

Select Scope OK Cancel

# Performance Measures

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To specify a scope of other than STATEWIDE, the user will click on the **Select Scope** command button, which causes the **Scope** window to be displayed, as illustrated below.



The user can now select **TA Type** or **TA Name** in the **Scope** option group, and then use the associated picklist fields to select the desired TA Type or TA Name. Once the desired criteria has been indicated, the user will click the **OK** button to return to the **Performance Measure Filter** window.

Once the desired criteria are specified in that window, the user can click **OK** again, which will open the **Performance Indicator** window, as illustrated on the next page.

# Performance Measures

Performance Indicators: Statewide

FINANCIAL

SERVICE OPERATIONS

FLEET UTILIZATION

Options

Fleet Utilization

| Transit Agency Name                   | Transit Agency Type | Year | Total Vehicles | Avg. Age of Fleet | Avg. HI | Avg. RSL | Vehicle Miles Maint Hrs | Vehicle Miles Prev Maint Hrs | Miles Per Vehicle |
|---------------------------------------|---------------------|------|----------------|-------------------|---------|----------|-------------------------|------------------------------|-------------------|
| INTERURBAN TRANSIT AUTHORITY          | Nonurban Township   | 1997 | 5              | 6.33              | 0       | 0        |                         |                              |                   |
| MILAN PUBLIC TRANSPORTATION, CITY OF  | Nonurban City       | 1997 | 5              | 3.80              | 0       | 0        |                         |                              |                   |
| FLINT MASS TRANSPORTATION AUTHORITY   | Urban Large         | 1997 | 273            | 0.00              | 0       | 0        |                         |                              |                   |
| FLINT MASS TRANSPORTATION AUTHORITY   | Nonurban County     | 1997 | 7              | 0.00              | 0       | 0        |                         |                              |                   |
| CAPITAL AREA TRANSPORTATION AUTHORITY | Urban Large         | 1997 | 79             | 0.00              | 0       | 0        |                         |                              |                   |
| CAPITAL AREA TRANSPORTATION AUTHORITY | Nonurban County     | 1997 | 8              | 0.00              | 0       | 0        |                         |                              |                   |
| GRAND RAPIDS TRANSIT AUTHORITY        | Urban Large         | 1997 | 76             | 0.00              | 0       | 0        |                         |                              |                   |
| GRAND RAPIDS TRANSIT AUTHORITY        | Nonurban County     | 1997 | 6              | 0.00              | 0       | 0        |                         |                              |                   |
| BAY METRO TRANSPORTATION AUTHORITY    | Urban Medium        | 1997 | 33             | 0.00              | 0       | 0        |                         |                              |                   |
| BAY METRO TRANSPORTATION AUTHORITY    | Nonurban County     | 1997 | 20             | 10.00             | 0       | 0        |                         |                              |                   |
| TWIN CITIES AREA TRANSPORTATION AUTH  | Urban Small         | 1997 | 38             | 4.90              | 0       | 0        |                         |                              |                   |
| DETROIT EAST METRO HEALTH             | Urban Metro         | 1997 | 6              | 5.50              | 0       | 0        |                         |                              |                   |
| EASTERN U.P. TRANSPORTATION AUTHORITY | Nonurban County     | 1997 | 10             | 4.40              | 0       | 0        |                         |                              |                   |
| BLUE WATER TRANSPORTATION COMMISSION  | Urban Medium        | 1997 | 21             | 0.00              | 0       | 0        |                         |                              |                   |
| BLUE WATER TRANSPORTATION COMMISSION  | Nonurban City       | 1997 | 1              | 0.00              | 0       | 0        |                         |                              |                   |

The records listed will be those meeting the specified filter criteria, and the **FINANCIAL** layer will be active as illustrated.

# Performance Measures

---

## Performance Indicators - Financial

Access to the **Performance Indicators** window is covered in the previous section. Once the window is open with the **FINANCIAL** layer active, the user can employ the horizontal and vertical scroll bars to view all of the listed indicators for all of the listed transit agencies.

The following is a list of the Financial performance indicators. A variety of additional indicators may be created using the ad hoc query tool, *InfoMaker*.

|   |                                       |
|---|---------------------------------------|
| Total eligible expenses                                     | Farebox per passenger                 |
| Federal funds to total eligible expenses                    | Cost per mile *                       |
| State funds to total eligible expenses                      | Cost per hour *                       |
| Local share to total eligible expenses                      | Total eligible expense per population |
| Farebox Recovery  | Federal funds per population          |
| Eligible administrative expenses to total eligible expenses | State funds per population            |
| Eligible operational expenses to total eligible expenses    | Local funds per population            |
| Eligible maintenance expenses to total eligible expenses    | Farebox per population                |
| Total eligible expenses per passenger *                     | Cost per vehicle                      |
| Federal funds per passenger                                 | Maintenance cost per mile             |
| State funds per passenger                                   | Maintenance Cost per hour             |
| Local funds per passenger                                   |                                       |

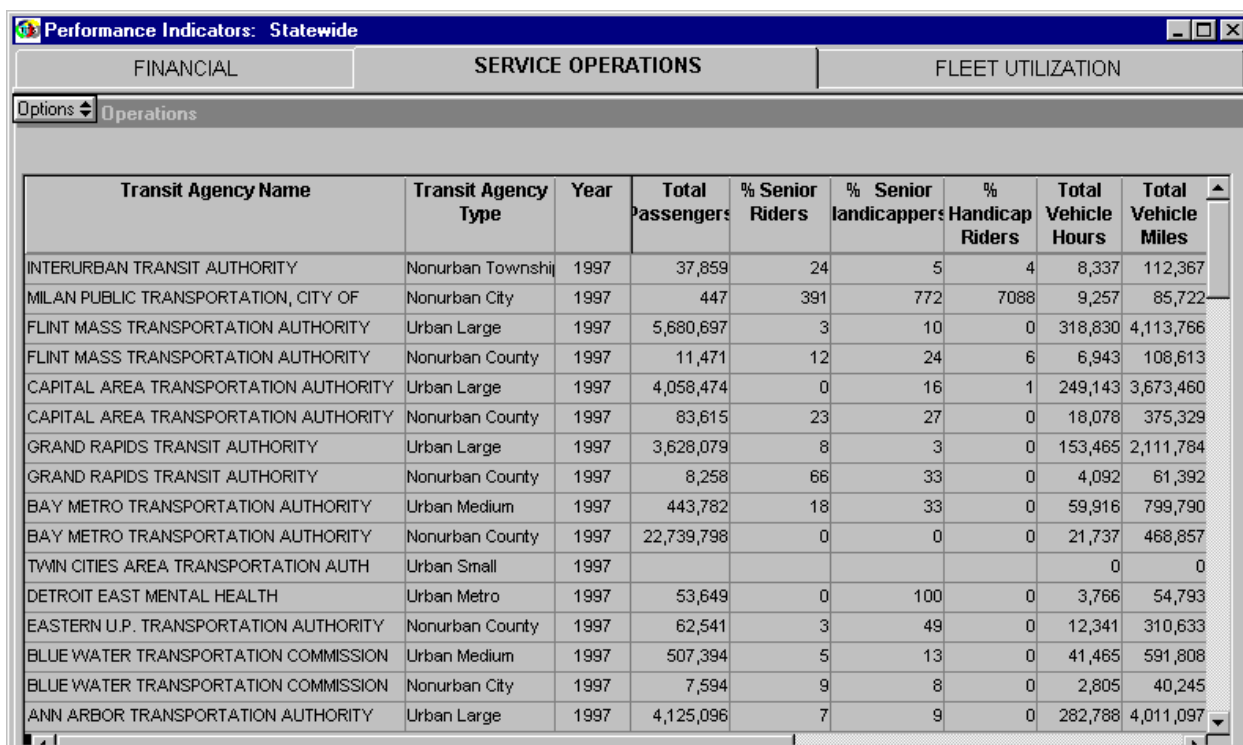
\* Standards available

The user can also filter, sort, and graph the records contained in this window. These functions will be covered later in the chapter.

# Performance Measures

## Performance Indicators - Service Operations

Access to the **Performance Indicators** window is covered in a previous section. Once the window is open with the **FINANCIAL** layer active, the user click on the **SERVICE OPERATIONS** window tab to access that layer, as illustrated below.



| FINANCIAL                             |                     | SERVICE OPERATIONS |                  |                 |                       | FLEET UTILIZATION |                     |                     |
|---------------------------------------|---------------------|--------------------|------------------|-----------------|-----------------------|-------------------|---------------------|---------------------|
| Options ▾ Operations                  |                     |                    |                  |                 |                       |                   |                     |                     |
| Transit Agency Name                   | Transit Agency Type | Year               | Total Passengers | % Senior Riders | % Senior handicappers | % Handicap Riders | Total Vehicle Hours | Total Vehicle Miles |
| INTERURBAN TRANSIT AUTHORITY          | Nonurban Township   | 1997               | 37,859           | 24              | 5                     | 4                 | 8,337               | 112,367             |
| MILAN PUBLIC TRANSPORTATION, CITY OF  | Nonurban City       | 1997               | 447              | 391             | 772                   | 7088              | 9,257               | 85,722              |
| FLINT MASS TRANSPORTATION AUTHORITY   | Urban Large         | 1997               | 5,680,697        | 3               | 10                    | 0                 | 318,830             | 4,113,766           |
| FLINT MASS TRANSPORTATION AUTHORITY   | Nonurban County     | 1997               | 11,471           | 12              | 24                    | 6                 | 6,943               | 108,613             |
| CAPITAL AREA TRANSPORTATION AUTHORITY | Urban Large         | 1997               | 4,058,474        | 0               | 16                    | 1                 | 249,143             | 3,673,460           |
| CAPITAL AREA TRANSPORTATION AUTHORITY | Nonurban County     | 1997               | 83,615           | 23              | 27                    | 0                 | 18,078              | 375,329             |
| GRAND RAPIDS TRANSIT AUTHORITY        | Urban Large         | 1997               | 3,628,079        | 8               | 3                     | 0                 | 153,465             | 2,111,784           |
| GRAND RAPIDS TRANSIT AUTHORITY        | Nonurban County     | 1997               | 8,258            | 66              | 33                    | 0                 | 4,092               | 61,392              |
| BAY METRO TRANSPORTATION AUTHORITY    | Urban Medium        | 1997               | 443,782          | 18              | 33                    | 0                 | 59,916              | 799,790             |
| BAY METRO TRANSPORTATION AUTHORITY    | Nonurban County     | 1997               | 22,739,798       | 0               | 0                     | 0                 | 21,737              | 468,857             |
| TWIN CITIES AREA TRANSPORTATION AUTH  | Urban Small         | 1997               |                  |                 |                       |                   | 0                   | 0                   |
| DETROIT EAST MENTAL HEALTH            | Urban Metro         | 1997               | 53,649           | 0               | 100                   | 0                 | 3,766               | 54,793              |
| EASTERN U.P. TRANSPORTATION AUTHORITY | Nonurban County     | 1997               | 62,541           | 3               | 49                    | 0                 | 12,341              | 310,633             |
| BLUE WATER TRANSPORTATION COMMISSION  | Urban Medium        | 1997               | 507,394          | 5               | 13                    | 0                 | 41,465              | 591,808             |
| BLUE WATER TRANSPORTATION COMMISSION  | Nonurban City       | 1997               | 7,594            | 9               | 8                     | 0                 | 2,805               | 40,245              |
| ANN ARBOR TRANSPORTATION AUTHORITY    | Urban Large         | 1997               | 4,125,096        | 7               | 9                     | 0                 | 282,788             | 4,011,097           |

The user can employ the horizontal and vertical scroll bars to view all of the listed indicators for all of the listed transit agencies.

The following is a list of the Service Operation performance indicators. A variety of additional indicators may be created using the Ad Hoc query tool, *InfoMaker*.

## Performance Measures

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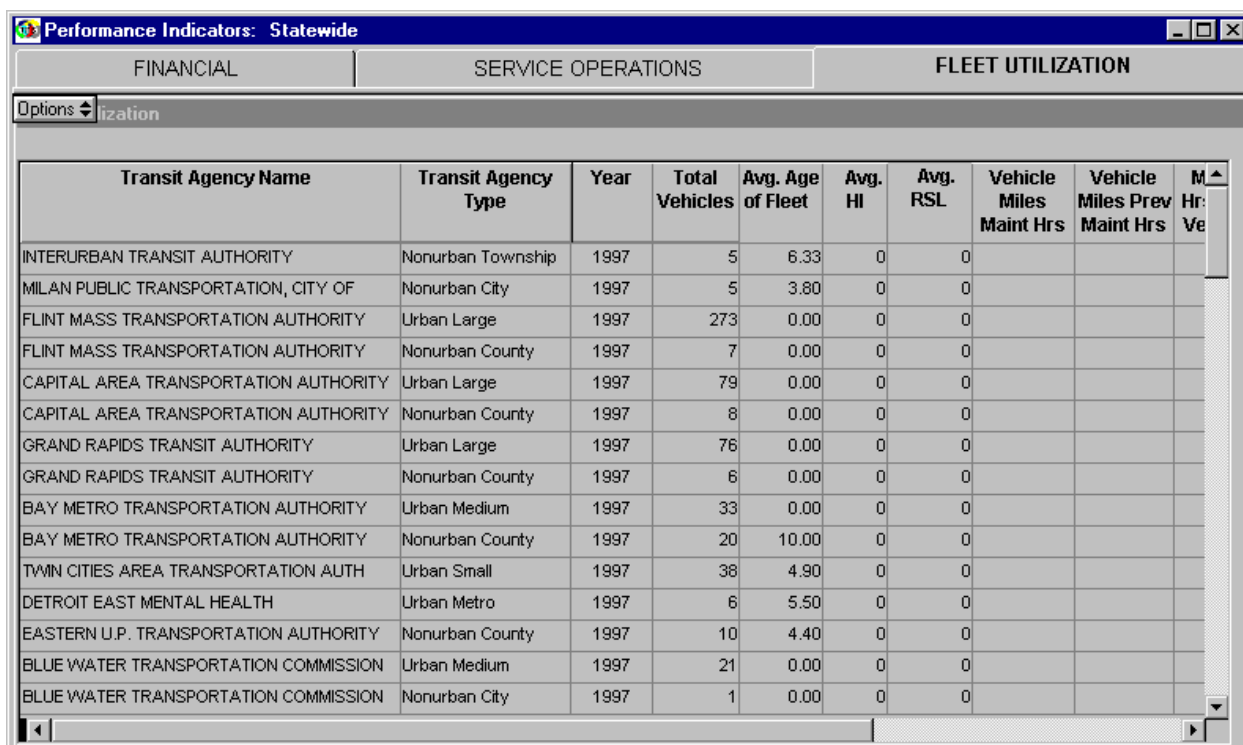
|  |                                    |
|--|------------------------------------|
| Total passengers                             | Passengers per 1,000 population    |
| % elderly passengers to total                | Passengers per square mile         |
| % persons with disabilities to total         | Vehicle miles per 1,000 population |
| % elderly persons with disabilities to total | Vehicle miles per square mile      |
| Total vehicle hours                          | Vehicle hours per 1,000 population |
| Total vehicle miles                          | Peak vehicles per 1,000 population |
| Passengers per hour *                        | Peak vehicles per square mile      |
| Passengers per mile *                        | vehicle miles per employee         |
| Passengers per employee                      | Vehicle hours per employee         |

\* Standards available

# Performance Measures

## Performance Indicators - Fleet Utilization

Access to the **Performance Indicators** window is covered in a previous section. Once the window is open with the **FINANCIAL** layer active, the user click on the **FLEET UTILIZATION** window tab to access that layer, as illustrated below.



| Transit Agency Name                   | Transit Agency Type | Year | Total Vehicles | Avg. Age of Fleet | Avg. HI | Avg. RSL | Vehicle Miles Maint Hrs | Vehicle Miles Prev Maint Hrs | M Hr: Ve |
|---------------------------------------|---------------------|------|----------------|-------------------|---------|----------|-------------------------|------------------------------|----------|
| INTERURBAN TRANSIT AUTHORITY          | Nonurban Township   | 1997 | 5              | 6.33              | 0       | 0        |                         |                              |          |
| MILAN PUBLIC TRANSPORTATION, CITY OF  | Nonurban City       | 1997 | 5              | 3.80              | 0       | 0        |                         |                              |          |
| FLINT MASS TRANSPORTATION AUTHORITY   | Urban Large         | 1997 | 273            | 0.00              | 0       | 0        |                         |                              |          |
| FLINT MASS TRANSPORTATION AUTHORITY   | Nonurban County     | 1997 | 7              | 0.00              | 0       | 0        |                         |                              |          |
| CAPITAL AREA TRANSPORTATION AUTHORITY | Urban Large         | 1997 | 79             | 0.00              | 0       | 0        |                         |                              |          |
| CAPITAL AREA TRANSPORTATION AUTHORITY | Nonurban County     | 1997 | 8              | 0.00              | 0       | 0        |                         |                              |          |
| GRAND RAPIDS TRANSIT AUTHORITY        | Urban Large         | 1997 | 76             | 0.00              | 0       | 0        |                         |                              |          |
| GRAND RAPIDS TRANSIT AUTHORITY        | Nonurban County     | 1997 | 6              | 0.00              | 0       | 0        |                         |                              |          |
| BAY METRO TRANSPORTATION AUTHORITY    | Urban Medium        | 1997 | 33             | 0.00              | 0       | 0        |                         |                              |          |
| BAY METRO TRANSPORTATION AUTHORITY    | Nonurban County     | 1997 | 20             | 10.00             | 0       | 0        |                         |                              |          |
| TWIN CITIES AREA TRANSPORTATION AUTH  | Urban Small         | 1997 | 38             | 4.90              | 0       | 0        |                         |                              |          |
| DETROIT EAST MENTAL HEALTH            | Urban Metro         | 1997 | 6              | 5.50              | 0       | 0        |                         |                              |          |
| EASTERN U.P. TRANSPORTATION AUTHORITY | Nonurban County     | 1997 | 10             | 4.40              | 0       | 0        |                         |                              |          |
| BLUE WATER TRANSPORTATION COMMISSION  | Urban Medium        | 1997 | 21             | 0.00              | 0       | 0        |                         |                              |          |
| BLUE WATER TRANSPORTATION COMMISSION  | Nonurban City       | 1997 | 1              | 0.00              | 0       | 0        |                         |                              |          |

The user can employ the horizontal and vertical scroll bars to view all of the listed indicators for all of the listed transit agencies.

The following is a list of the Fleet Utilization performance indicators. A variety of additional indicators may be created using the Ad Hoc query tool, *InfoMaker*.

## Performance Measures

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|  |   |
|--|---|
| Total vehicles   | Average miles per vehicle per day - line-haul and demand response |
| Number of peak vehicles                                  | Average hours per vehicle per day - line-haul and demand response |
| Spare ratio  | Average age of fleet  |
| Number of line-haul vehicles                             | Average health index (HI)   |
| % of line-haul vehicles with lifts                       | Average remaining service life (RSL)                              |
| Number of demand response vehicles                       | Vehicle miles per total maintenance hours                         |
| Number of demand response vehicles with lifts            | Vehicle miles per total preventive maintenance hours              |
| Annual miles per vehicle - line-haul & demand response   | Maintenance hours per vehicle                                     |
| Annual hours per vehicle - line-haul and demand response | Preventive maintenance hours to total maintenance hours           |

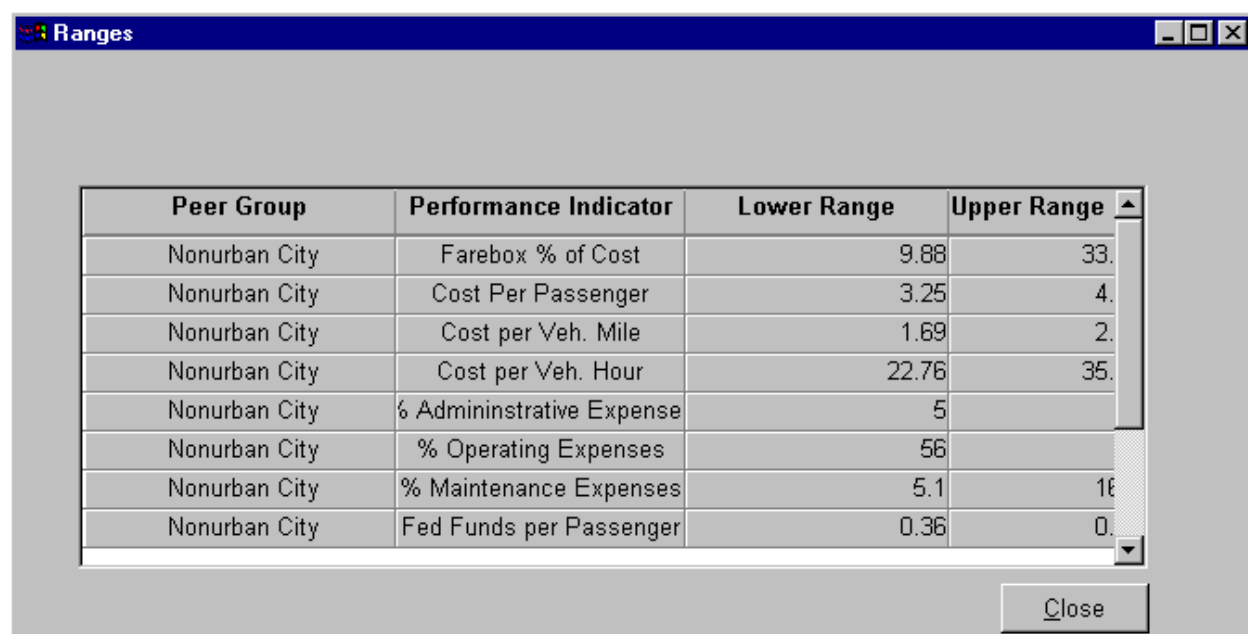
\* Standards available

# Performance Measures

## Ranges

Each of the three Performance Indicator windows has an associated **Ranges** window that shows the minimum and maximum value of each performance indicator field for the records selected through the Performance Measure Filter window.

To access the Ranges window, the user will first make the desired Performance Indicator layer active by clicking on the appropriate layer tab. Once the layer is active, the user will click the **Options** command menu button, and select **Ranges** from the menu displayed. As a result of this action the **Ranges** window for the active layer will open. The Ranges window associated with the FINANCIAL layer is illustrated below. The other Ranges windows are similar in format and operation.



The screenshot shows a window titled "Ranges" with a table containing performance indicators and their ranges. The table has four columns: Peer Group, Performance Indicator, Lower Range, and Upper Range. The data is as follows:

| Peer Group    | Performance Indicator    | Lower Range | Upper Range |
|---------------|--------------------------|-------------|-------------|
| Nonurban City | Farebox % of Cost        | 9.88        | 33.         |
| Nonurban City | Cost Per Passenger       | 3.25        | 4.          |
| Nonurban City | Cost per Veh. Mile       | 1.69        | 2.          |
| Nonurban City | Cost per Veh. Hour       | 22.76       | 35.         |
| Nonurban City | % Administrative Expense | 5           |             |
| Nonurban City | % Operating Expenses     | 56          |             |
| Nonurban City | % Maintenance Expenses   | 5.1         | 16          |
| Nonurban City | Fed Funds per Passenger  | 0.36        | 0.          |

A vertical scroll bar is located on the right side of the table, and a "Close" button is at the bottom right of the window.

The user can employ the vertical scroll bar to view the ranges for all Performance Indicators. When through with this window, the user can click the **Close** button at the lower right of the window.

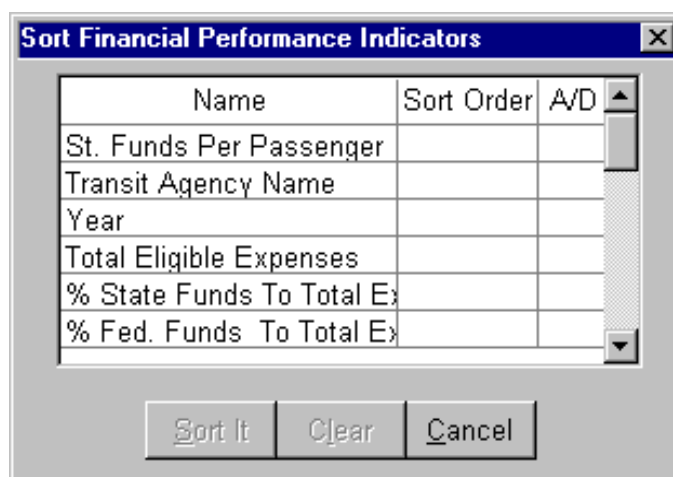
## Sorting

PTMS provides the user the ability to sort the list of transit agency records by any displayed field, or by multiple fields. Sorting the records in a certain order may assist the user in quickly locating a desired record.

To sort the table section of the **Performance Indicator** window, which ever layer is active, on one of the displayed fields, the user will begin by clicking anywhere in the column representing the field by which the table will be sorted. Then while pointing the mouse at this column, the user will press the right mouse button to activate the shortcut menu. From this menu the user will select the **Sort** command. As a result of this action the table will sort in ascending order by the selected column (field). To sort in descending order, the user will simply perform the identical operation again.

Note that any sorting performed is in effect only while the **Open TA** window is open. Once the window is closed and reopened, the sort order will revert to its default setting.

Another option available is the ability to sort by more than one field at once. This is called **Sort+**. To perform this multi-field sort, the user will display the shortcut menu as discussed earlier, and then select the **Sort+** command. As a result of this action a **Sort** window similar to the one illustrated below is opened.



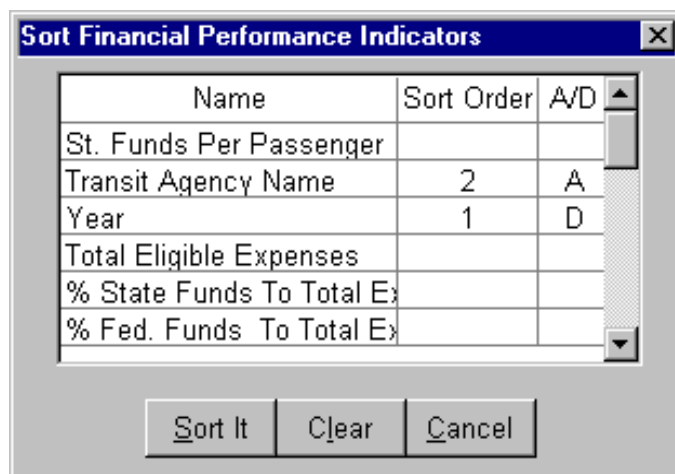
In the **Name** column will be the names of fields by which the table can be sorted. The **Sort Order** column indicates the priority sort order of the multiple sort fields selected. The **A/D** column indicates whether the sort order is to be ascending or descending for selected sort fields.

To select a field to sort by, the user simply clicks in the **Sort Order** column of the desired field. The first row clicked in becomes the number 1 priority sort field, the second 2, and so on.

# Performance Measures

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Each sort field selected is set to ascending (A) by default, but by clicking in the **A/D** column the user can change the A to D (descending). The diagram below illustrates a two key sort on Year and Transit Agency Name. Year is the primary sort key, and Transit Agency Name secondary. Year will sort descending, and Transit Agency Name ascending.



When the sort keys are set up as desired, the user will click on the **Sort It** button to close this window and have the table sorted as desired. The **Clear** button clears out all currently indicated sort key information. The **Cancel** button closes this window without performing any sort indicated.

## Filtering

PTMS provides the user the ability to add more filters to the Performance Indicator window than were specified in the Performance Measure Filter window covered earlier in this chapter. One reason that a user might care to add more filters is to view only a more restricted set of records. Another reason is perhaps the user wants to create a specific filter set for graphing purposes, which will be covered in the next section.

To perform filtering in either of the three Performance Indicator window layers, the user will point to the table area of the window, and then right click the mouse to display the shortcut menu. From the shortcut menu the user will select the **Filter** command. This action causes a **Filter Performance Indicators** window to open, as illustrated below. The exact contents of the window will depend upon the Performance Indicator layer that is active when the **Filter** command is executed. The illustration below is for the Financial layer.

| Name                        |   | Value | or |
|-----------------------------|---|-------|----|
| St. Funds Per Passenger     | = |       |    |
| Transit Agency Name         | = |       |    |
| Year                        | = |       |    |
| Total Eligible Expenses     | = |       |    |
| % State Funds To Total Expe | = |       |    |

Filter it Clear Complex Or Cancel Values Help

In the **Name** column at the left is a list of all fields in the active layer upon which filters can be built. The next unlabeled column to the right contains the relational operators for building the filter conditions. By pointing to the = (equals sign) and clicking the left mouse button, the user can scroll through a selection of operators, which includes > (greater than), < (less than), and <> (not equal to).

The **Value** column will contain the criteria value determining which records are retrieved. The user can enter the desired value directly, such as typing HARBOR TRANSIT in the Value column, to the right of the **Transit Agency Name** field. Instead of typing the value, the user can click in the Value column to the right of the field for which a value is to be entered, and then click on the **Values** command button. As a result of this action a window will open which lists acceptable values for the given field. The diagram on the top of the next page illustrates the result of clicking the **Values** button while the Value cell to the right of the Transit Agency Name field is active.

# Performance Measures

| Select a Value                          | Count |
|---|-------|
| ADRIAN DIAL-A-RIDE                      | 1     |
| ALMA DIAL-A-RIDE                        | 1     |
| ALPENA, CITY OF                         | 1     |
| BELDING DIAL-A-RIDE                     | 1     |
| BIG RAPIDS DIAL-A-RIDE                  | 1     |
| BUCHANAN DIAL-A-RIDE                    | 1     |
| CARO TRANSIT AUTHORITY                  | 1     |
| DOWAGIAC DIAL-A-RIDE                    | 1     |
| GREATER LAPEER TRANSPORTATION AUTHORITY | 1     |
| GREENVILLE TRANSIT                      | 1     |
| HARBOR TRANSIT                          | 1     |
| HILLSDALE DIAL-A-RIDE                   | 1     |
| HOUGHTON MOTOR TRANSIT LINE             | 1     |
| IONIA DIAL-A-RIDE                       | 1     |
| LUDINGTON MASS TRANSPORTATION AUTH      | 1     |
| MARSHALL, CITY OF                       | 1     |
| MIDLAND DIAL-A-RIDE                     | 1     |
| SAULT STE. MARIE, CITY OF               | 1     |

18 values

Close Help

As expected, a list of Transit Agency Names is presented for selection. The user will employ the vertical scroll bar if necessary to locate and click on the desired value in the list, and then click the **C**lose button. This action will return the selected value to the Filter window. The illustration below results from selecting GREENVILLE TRANSIT and clicking **C**lose.

| Name                        |   | Value              | or |
|-----------------------------|---|--------------------|----|
| St. Funds Per Passenger     | = |                    |    |
| Transit Agency Name         | = | GREENVILLE TRANSIT |    |
| Year                        | = |                    |    |
| Total Eligible Expenses     | = |                    |    |
| % State Funds To Total Expe | = |                    |    |

Filter it Clear Complex Or Cancel Values Help

# Performance Measures

If the filter was now complete, the user would click on the **Filter it** button to return to the Performance Indicator window with only the records meeting the indicated filter visible. By clicking on **Cancel**, the user would be returned to the Performance Indicator window with no additional filtering applied. To clean out all entered criteria and start with a clean Filter window, the user would click on the **Clear** button. To get help concerning the Filter window, the use can click on **Help**.

The **Or** button is clicked only when the user wants to add another criteria value to one that already has a value. For example, the filter illustrated at the bottom of the previous page has a criteria **Transit Agency Name = GREENVILLE TRANSIT**. Suppose the user wanted to view data for Harbor Transit at the same time. The user would first click on the GREENVILLE TRANSIT value to make that row active, and then click on the **Or** button. As a result a new Transit Agency Name row would be created, and an **or** placed in the **or** column at the right, as illustrated below.

| Name                        |   | Value              | or |
|-----------------------------|---|--------------------|----|
| St. Funds Per Passenger     | = |                    |    |
| Transit Agency Name         | = | GREENVILLE TRANSIT | or |
| Transit Agency Name         | = |                    |    |
| Year                        | = |                    |    |
| Total Eligible Expenses     | = |                    |    |
| % State Funds To Total Expe | = |                    |    |

Filter it Clear Complex Or Cancel Values Help

To complete this filter criteria, the user could either type HARBOR TRANSIT below GREENVILLE TRANSIT, or use the **Values** button to select HARBOR TRANSIT. The result would be as below.

| Name                        |   | Value              | or |
|-----------------------------|---|--------------------|----|
| St. Funds Per Passenger     | = |                    |    |
| Transit Agency Name         | = | GREENVILLE TRANSIT | or |
| Transit Agency Name         | = | HARBOR TRANSIT     |    |
| Year                        | = |                    |    |
| Total Eligible Expenses     | = |                    |    |
| % State Funds To Total Expe | = |                    |    |

Filter it Clear Complex Or Cancel Values Help

# Performance Measures

Clicking in the **or** column in the cell to the right of the **Name** field to be duplicated provides the same result as clicking the **Or** button while the correct **Name** row is active.

Criteria can be added to other Name fields as well. Suppose the user wanted information for the two transit agencies indicated, but only for years earlier than 1996. The user would move to the **Year** row, point to the equal sign in the second column, and click the left mouse as many times as necessary until a < (less than sign) appears. The user will then click in the Value column, in the cell to the right of the less than sign, and type in 1996, or click on the **Values** button, and select 1996. When through, the results would appear as below.

| Name                        |   | Value              | or |
|-----------------------------|---|--------------------|----|
| St. Funds Per Passenger     | = |                    |    |
| Transit Agency Name         | = | GREENVILLE TRANSIT | or |
| Transit Agency Name         | = | HARBOR TRANSIT     |    |
| Year                        | < | 1996               |    |
| Total Eligible Expenses     | = |                    |    |
| % State Funds To Total Expe | = |                    |    |

Filter it Clear Complex Or Cancel Values Help

Criteria in fields that are not joined by an **OR** as explained above are assumed to be joined by a logical **AND**. This means that the window above is going to be interpreted by PTMS as follows:

(Transit Agency Name = GREENVILLE TRANSIT **AND** Year < 1996) **OR**  
(Transit Agency Name = HARBOR TRANSIT **AND** Year < 1996)

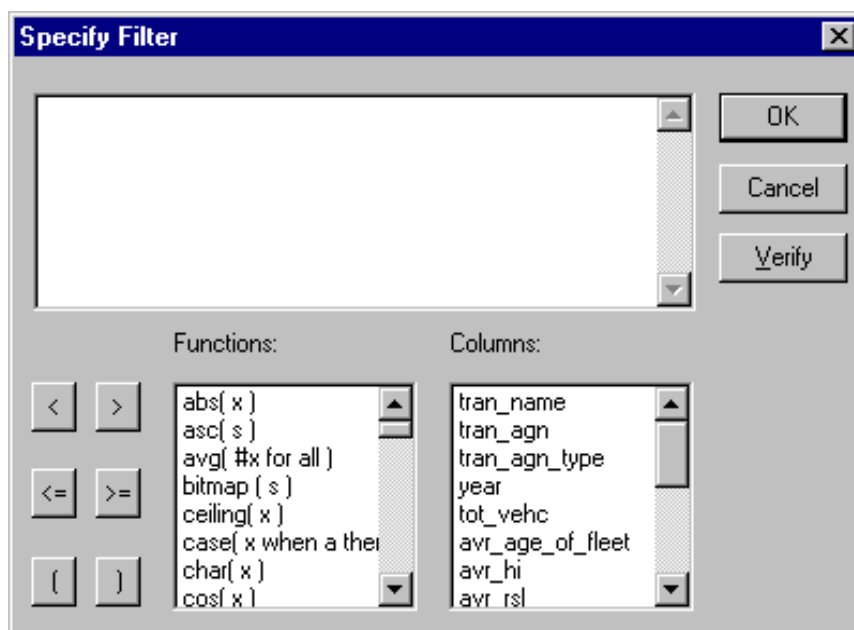
This means that only Greenville Transit records before 1996 and Harbor Transit records before 1996 will be displayed. The **AND** condition assumes both criteria must be true for the record to be displayed. The **OR** condition will display a record if either criteria is true.

If the filter was now complete, the user would click on the **Filter it** button to return to the Performance Indicator window with only the records meeting the indicated filter visible. By clicking on **Cancel**, the user would be returned to the Performance Indicator window with no additional filtering applied. To clean out all entered criteria and start with a clean Filter window, the user would click on the **Clear** button.

# Performance Measures

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The **Complex** button can be selected by the user while in any Value field to open the **Specify Filter** window illustrated below.



This window is similar to the “expression builder” window found in many database applications. By using the Functions, Columns, and command buttons available, the user can build complex filter expressions. Users familiar with use of such a tool will have no problem using it.

In depth instruction in use of this tool is beyond the scope of this manual.

# Performance Measures

## Graphing

The ability to graph data in a table window is found in a number of places in PTMS. This manual will explain graphing in conjunction with the Performance Indicator window, but the same principles and methods will apply anywhere graphing is available.

The first step in creating a graph in any of the three Performance Indicator layers (Financial, Service Operations, Fleet Utilization) is to filter the window as described in the previous section so that the records that are to be the basis of the graph are the only ones displayed.

Once the window is ready for graphing, the user will point to the table section of the window, click the right mouse button to display the shortcut menu, and select **Graph** from the menu displayed. As a result the **Specify Graph Data** window is displayed, as illustrated below.

| Column                          | Axis   | Numeric Functions | Custom Label |
|---------------------------------|--|-------------------|--------------|
| Transit Agency Name             | <input type="radio"/> X Axis <input type="radio"/> Y Axis <input type="radio"/> None |                   |              |
| tran_agn_type                   | <input type="radio"/> X Axis <input type="radio"/> Y Axis <input type="radio"/> None |                   |              |
| Year                            | <input type="radio"/> X Axis <input type="radio"/> Y Axis <input type="radio"/> None |                   |              |
| Total Eligible Expenses         | <input type="radio"/> X Axis <input type="radio"/> Y Axis <input type="radio"/> None |                   |              |
| % State Funds To Total Expenses | <input type="radio"/> X Axis <input type="radio"/> Y Axis <input type="radio"/> None |                   |              |
| % Fed. Funds To Total Expenses  | <input type="radio"/> X Axis <input type="radio"/> Y Axis <input type="radio"/> None |                   |              |
| % Local Funds To Total Expenses | <input type="radio"/> X Axis <input type="radio"/> Y Axis <input type="radio"/> None |                   |              |

Under **Column** at the left is all fields in the active table upon which a graph can be built. The vertical scroll bar allows access to fields not currently in view.

Under **Axis** to the left is an option group in which the user can indicate if the given field is to be placed on the X or Y-axis of the graph, or not be placed at all (None). Only one field can be placed on the X-axis. Note that the default setting for all fields is None, even though the value is not currently indicated. The None option can be used to remove a value from an axis that has been previously placed there. Do not use the **Clear** button to try to remove an individual Column, as **Clear** will remove ALL entries made in this window.

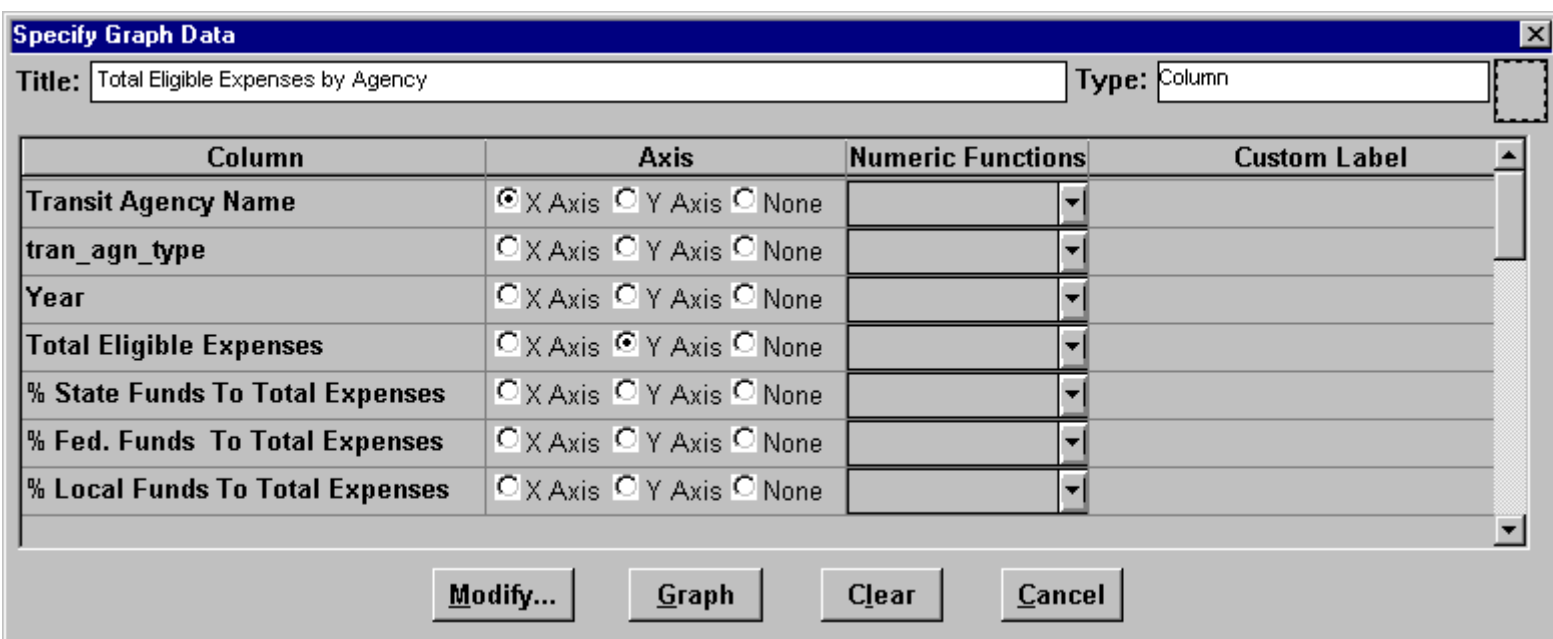
# Performance Measures

The **Numeric Functions** column allows a user to involve the given Column field in calculations concerning the values in the field, such as average, count, sum, and graph the calculated result. These options are available only for numeric fields.

The **Custom Label** column allows users to enter a name other than that indicated in the Column field to be displayed on the graph. For example, in the illustration above, the user might want to add a column label **Transaction Agency Type** for the field **tran\_agn\_type**.

The **Title** field at the top of the window is editable, and the user can enter the title to appear on the graph as desired.

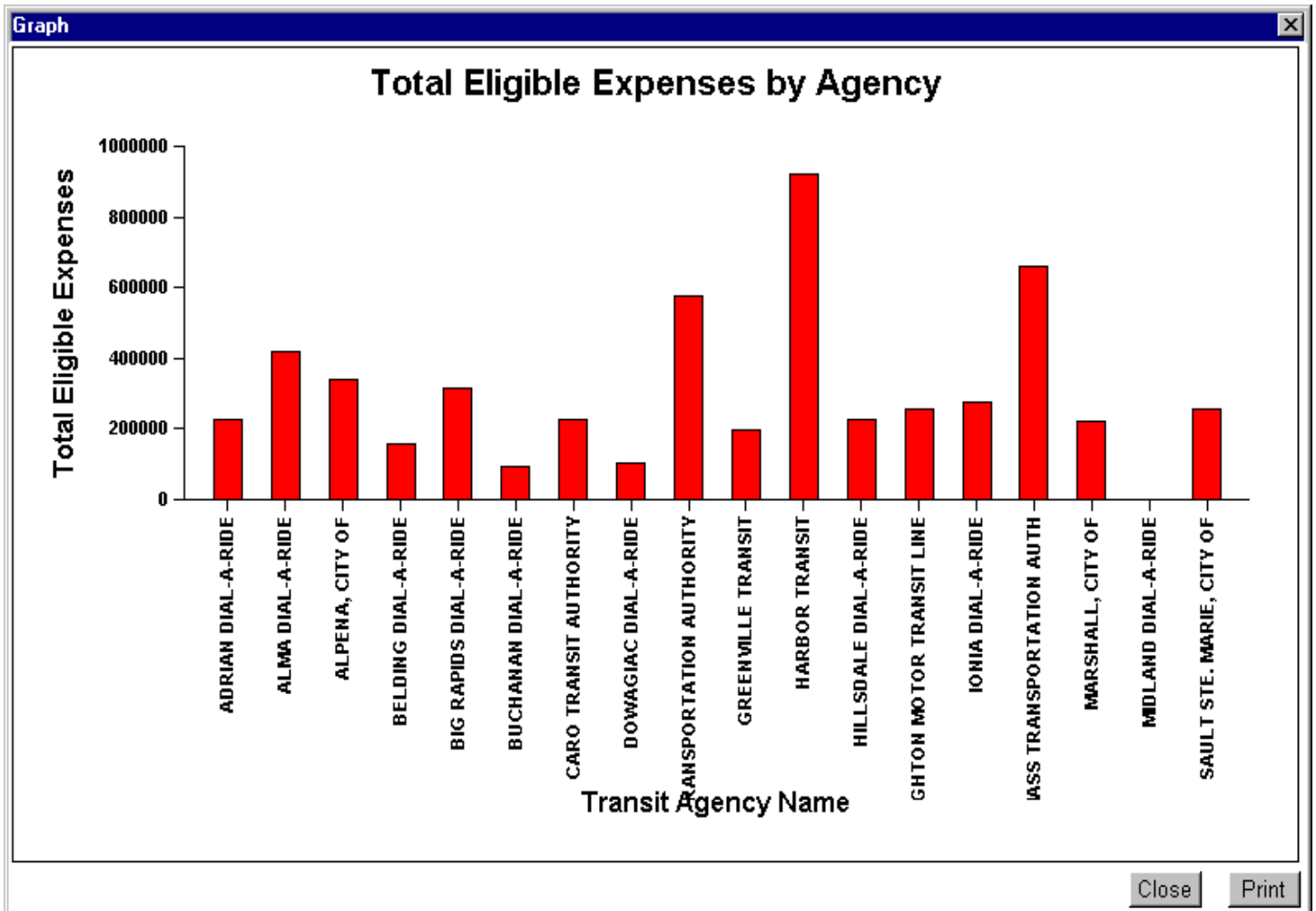
Once the user has made the desired selections, the **Specify Graph Data** window might look as follows.

The image shows a software window titled "Specify Graph Data". At the top, there is a "Title:" text box containing "Total Eligible Expenses by Agency" and a "Type:" dropdown menu set to "Column". Below this is a table with four columns: "Column", "Axis", "Numeric Functions", and "Custom Label". The table contains seven rows of data. The "Axis" column has radio button options for "X Axis", "Y Axis", and "None". The "Numeric Functions" column has a dropdown arrow. The "Custom Label" column is empty. At the bottom of the window are four buttons: "Modify...", "Graph", "Clear", and "Cancel".

| Column                          | Axis  | Numeric Functions | Custom Label |
|---------------------------------|---|-------------------|--------------|
| Transit Agency Name             | <input checked="" type="radio"/> X Axis <input type="radio"/> Y Axis <input type="radio"/> None |                   |              |
| tran_agn_type                   | <input type="radio"/> X Axis <input type="radio"/> Y Axis <input type="radio"/> None            |                   |              |
| Year                            | <input type="radio"/> X Axis <input type="radio"/> Y Axis <input type="radio"/> None            |                   |              |
| Total Eligible Expenses         | <input type="radio"/> X Axis <input checked="" type="radio"/> Y Axis <input type="radio"/> None |                   |              |
| % State Funds To Total Expenses | <input type="radio"/> X Axis <input type="radio"/> Y Axis <input type="radio"/> None            |                   |              |
| % Fed. Funds To Total Expenses  | <input type="radio"/> X Axis <input type="radio"/> Y Axis <input type="radio"/> None            |                   |              |
| % Local Funds To Total Expenses | <input type="radio"/> X Axis <input type="radio"/> Y Axis <input type="radio"/> None            |                   |              |

When all settings and entries are made as desired, the user will click on the **Graph** command button at the bottom of the window. As a result the **Graph** window is displayed for indicated specifications, as illustrated on the next page.

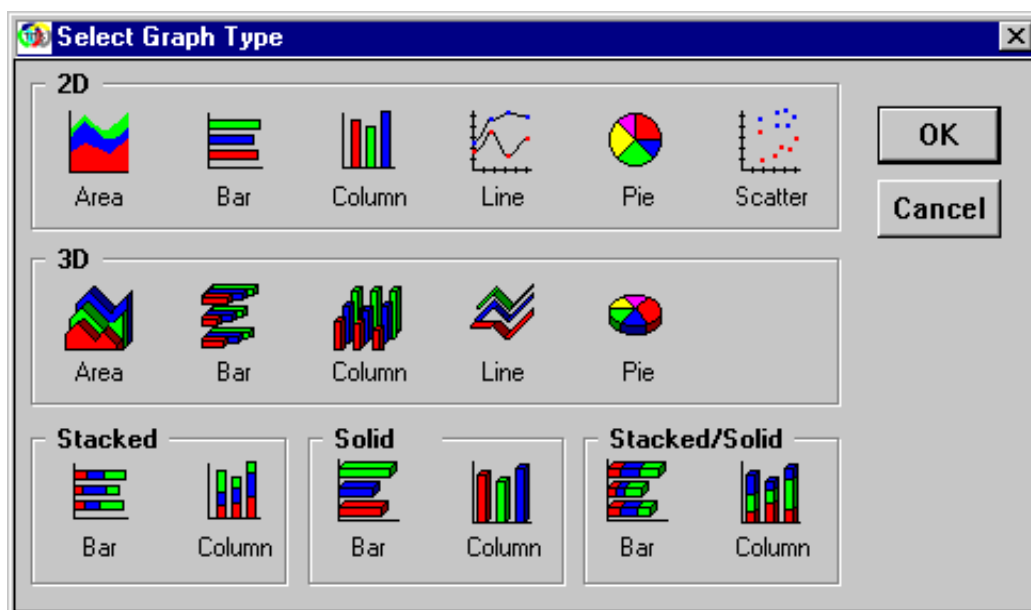
# Performance Measures



The user can now view the graph, print it by clicking on the **Print** button at the lower right of the window, or close it via the **Close** button.

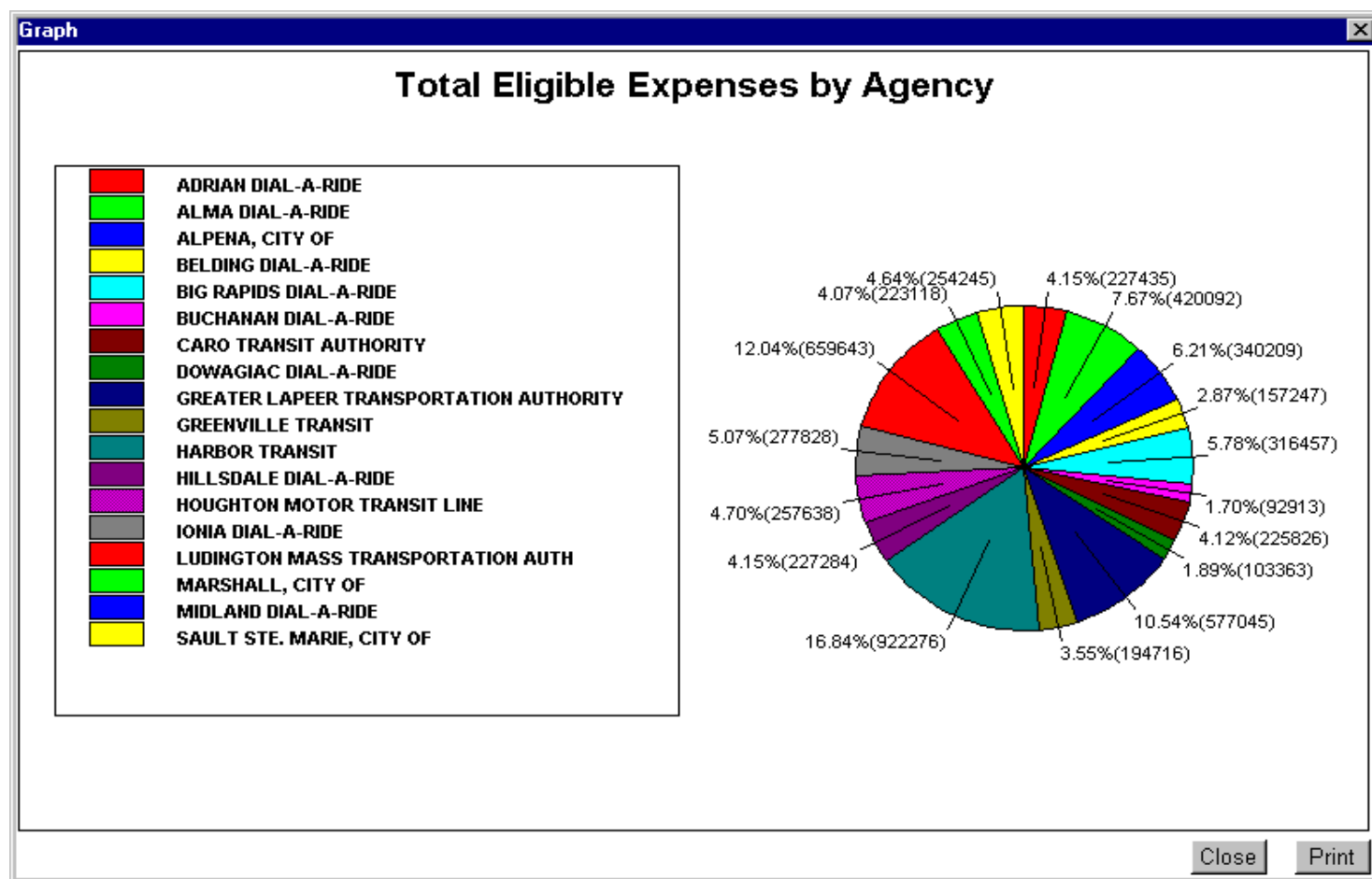
# Performance Measures

The default graph type is Column, as illustrated above. The user can change the type of graph by closing the graph, which returns the user to the **Specify Graph Data** window. In that window the user can click on the **Modify...** button at the bottom of the window. As a result the **Select Graph Type** window is displayed, as illustrated below.



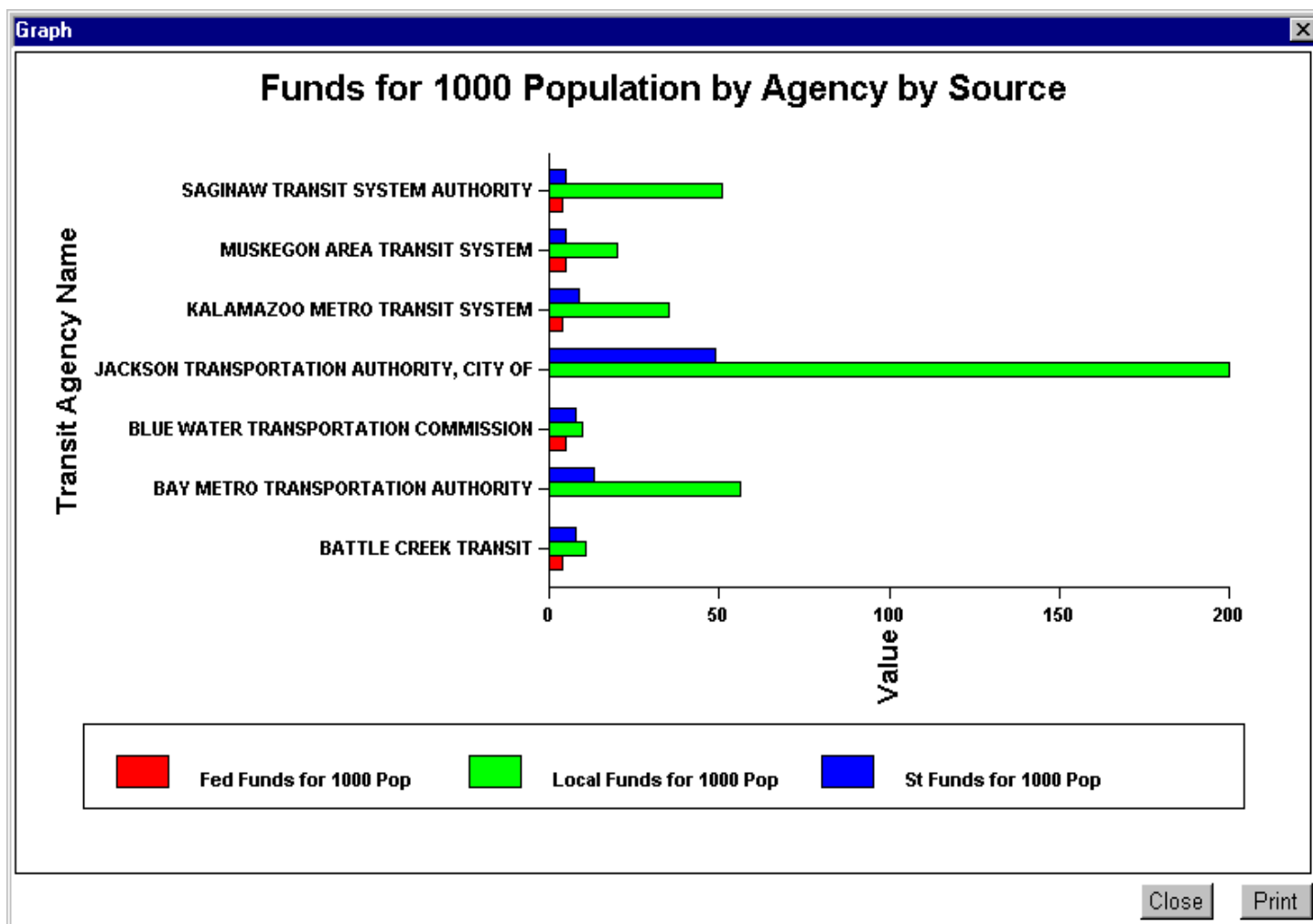
# Performance Measures

The user can now click on the desired graph type, and then click on **OK**. For example, suppose the user selected the **2D - Pie** type. When the user clicks on **Graph** again, the result is illustrated below.



# Performance Measures

Below is an example of a bar graph with three fields graphed per agency.



Note that graphs or graph settings cannot be saved, and if the Specify Graph Data window is closed and reopened, all previously entered settings will be lost. It may be wise to manually note all graph entries and settings for any graphs that will have to be recreated on a regular basis.

## **Goals, Objectives, Actions**

Last Chapter Update: 12/8/98

# Goals, Objectives, Actions

## Overview

This chapter will cover the access and use of the **Goal Association** and **Objectives and Actions** windows, including use of the selection window, and access of the associated detail windows.

## Accessing Goals, Objectives, Actions Information

To access the goals, objectives, actions information the user will first start PTMS as discussed starting on page 2.3. If the **Public Transportation Gateway** window is displayed, the user can click on **Cancel** to close that window.

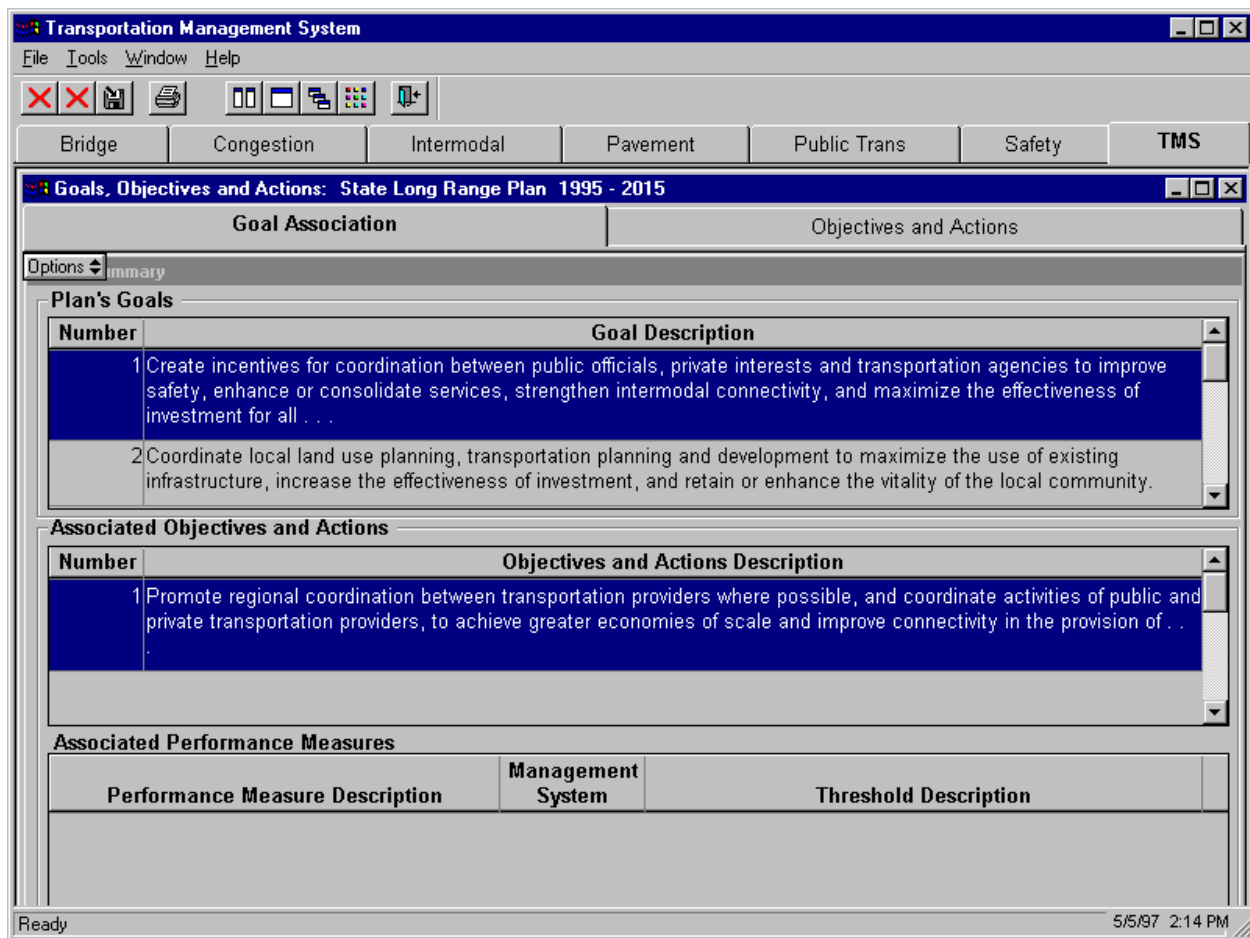
Once in the PTMS Main Menu window, the user can access the performance measures by selecting **Tools | Goals, Objectives and Actions** from the menu bar. As a result of this action the **Goals, Objectives and Actions** filter window is displayed, as illustrated below.

| Description           | Beginning Date | Ending Date |
|-----------------------|----------------|-------------|
| State Long Range Plan | 1995           | 2015        |

This window allows the user to locate and select the plan record to be accessed. The user will employ the associated picklist fields to select the **Owner Type** and, if appropriate, the desired Owner from the **Owner List**. Directly as a result of these selections, the list in the **Matching Plans** section will contain only plans meeting the indicated filter criteria.

# Goals, Objectives, Actions

Once the desired filters are in place, the user will employ the vertical scroll bar if necessary to locate and select the plan record (row) for which information is desired. The user will then point to and double-click on the desired plan. As a result of this action the **Goals, Objectives and Actions** data window will open, as illustrated below, with the details of the indicated plan displayed.



This window has two layers, one for **Goal Association**, and one for **Objectives and Actions**. The user can make either layer active by clicking on the appropriate layer tab. The **Goal Association** layer is active by default, as illustrated above.

# Goals, Objectives, Actions

---

## Goal Association

The user will access the **Goal Association** layer of the **Goals, Objectives and Actions** window as described in the previous section. This layer displays the **Goal Summary** window.

The **Goal Summary** window is divided into three related sections: **Plan's Goals, Associated Objectives and Actions**, and **Associated Performance Measures**. The Plan's Goals section is divided into a number of rows, each with a **Number**, and an associated **Goal Description**. The Associated Objectives and Actions section is divided into a number of rows also, each with a **Number** and an **Objectives and Actions Description**. The Associated Performance Measures section has three fields for **Performance Measure Description**, **Management System**, and **Threshold Description**.

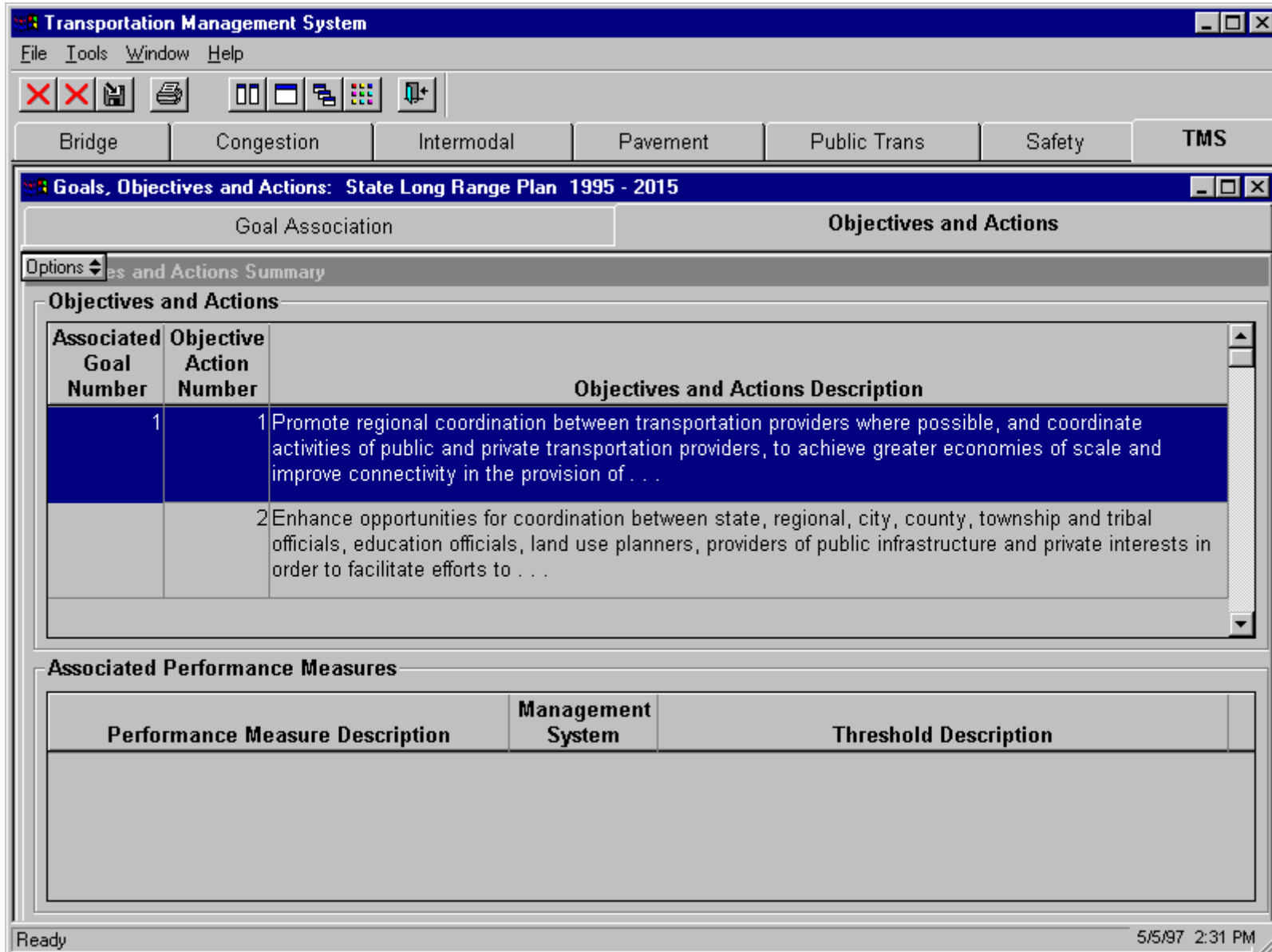
The sections are related in that the content of the lower sections depend upon the record (row) that is active in the Plan's Goals section. Selecting a different numbered row in the Plan's Goals section will cause different records to be displayed in the Associated Objectives and Actions section, hence the name Associated. The objectives and actions there tie specifically to the plan goal selected.

By clicking in the desired rows, the user can view goal, objective, and action information.

# Goals, Objectives, Actions

## Objectives and Actions

Once the user has accessed the Goals, Objectives and Actions window as described earlier in this chapter, the user can access the **Objectives and Actions** layer by clicking on the associated layer tab. As a result the **Objectives and Actions Summary** window is displayed, as illustrated below.



This window is divided into two sections: **Objectives and Actions** section, **Associated Performance Measures** section. The Objectives and Actions section has rows corresponding to each **Objective Action Number** for the indicated **Associated Goal Number**. All Goal Numbers for the currently selected Plan are listed. The listed Performance Measures correspond to the selected Objective Action Number record. By clicking in the desired rows, the user can view information.

# Goals, Objectives, Actions

---

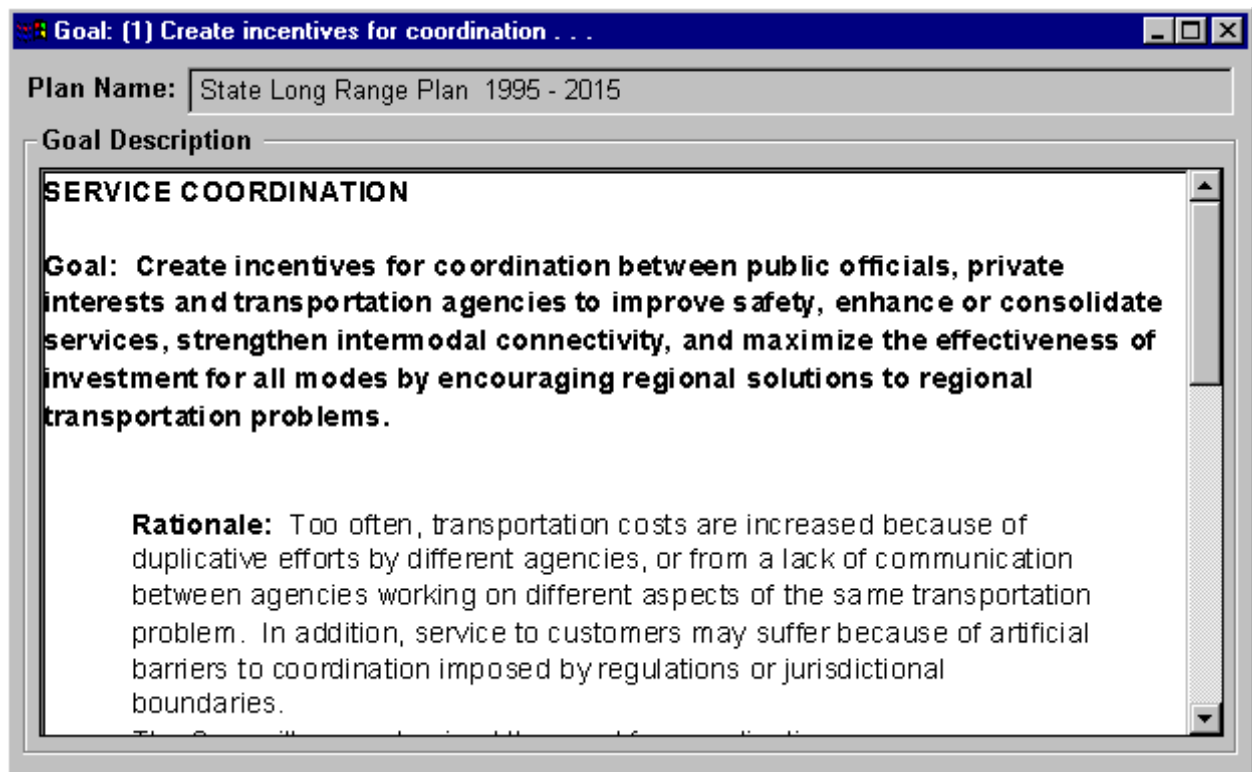
## Detail Windows

Each of the two window layers described in the preceding sections are summary windows. The complete text of the goals, objections, and actions is not provided in these windows. Note that the text in each row ends with an ellipsis (...) indicating more text follows.

To gain access to the complete text of goals, objectives, and actions, the user must access the detail window for the desired goal, objective, or action.

To access the detail window for any goal, objective, or action, the user will first locate the desired record (numbered row) in either the **Goal Summary** or **Objectives and Actions Summary** windows. Once the desired record is located, the user will double-click on the desired record to open the associated detail window.

The diagram below is an illustration of the result of double-clicking on record 1 in the Plan's Goals section of the Goal Summary window illustrated on page 12.3, 4.



# Goals, Objectives, Actions

The diagram below is an illustration of the result of double-clicking on record 1 in the Associated Objectives and Actions section of the Goal Summary window illustrated on page 12.3, 4.

**Objective and Actions: [1] Promote regional coordination . . .**

Plan Name: State Long Range Plan 1995 - 2015

**Associated Goal Description**

| Number | Goal Description  |
|--------|---|
| 1      | Create incentives for coordination between public officials, private interests and transportation agencies to improve safety, enhance or consolidate services, strengthen intermodal connectivity, and maximize the effectiveness of investment for all . . . |

**Objectives and Actions Description**

**Promote regional coordination between transportation providers where possible, and coordinate activities of public and private transportation providers, to achieve greater economies of scale and improve connectivity in the provision of transportation service across and within jurisdictions and among modes.**

- Identify mechanisms to reward regional approaches to addressing transportation needs.
- Facilitate consolidation and coordination of transportation service delivery or functions where beneficial between transit systems, public agencies, private transportation providers, and modes.
- As part of the MDOT annual certification process, review urban area work programs to ensure that transit issues are identified and are being

The window above is the detail window for records in the Objectives and Actions Summary window as well.

Once the detail window is open, the use can employ the vertical scroll bar to view all information contained in the Description section of the windows.

When through with either window, the user can close it either by clicking the Close button at the right end of the title bar of the window, or double-clicking the control menu icon at the left end of the title bar of the window.

## **Capital Menu**

Last Chapter Update: 12/8/98

## Overview

The **Capital** pull-down menu in the PTMS Main Menu window provides the user access to the following four areas:

Statewide Capital Requests

Capital Prioritization

Condition Distribution

Fleet Analysis

In each of these areas the user has access to a read-only window of information concerning the given area. Depending on the window, the user may be able to filter, sort, and graph the provided information.

## Statewide Capital Requests

To access the statewide capital request information the user will first start PTMS as discussed starting on page 2.3. If the **Public Transportation Gateway** window is displayed, the user can click on **Cancel** to close that window.

Once in the PTMS Main Menu window, the user can access the performance measures by selecting **Capital | Statewide Capital Requests** from the menu bar. As a result of this action the **Capital Requests** window is displayed, as illustrated on the next page.

# Capital Menu

| Capital Requests |        |            |           |             |          |          |     |                    |         |        |
|------------------|--------|------------|-----------|-------------|----------|----------|-----|--------------------|---------|--------|
| App. Yr          | Req Yr | TA         | TA ID     | Status      | Program  | Type     | Qty | Cap. Item Desc     | Action  | Feder. |
| 1997             | 1997   | CAPITAL AF | 381969989 | REQUESTED   | 100% STA | Vehicle  | 1   |                    | REPLACE |        |
| 1997             | 1997   | ISABELLA C | 382161440 | REQUESTED   |          | Equipme  |     |                    | REPLACE | 8      |
| 1997             | 1997   | ISABELLA C | 382161440 | REQUESTED   |          | Facility |     |                    | REPLACE | 19     |
| 1998             | 1998   | BARRY CO   | 386004836 | REQUESTED   | 100% STA | Vehicle  | 0   |                    | REPLACE | 114    |
| 1998             | 1998   | BARRY CO   | 386004836 | REQUESTED   | 100% STA | Vehicle  | 0   |                    | REPLACE | 145    |
| 1998             | 1998   | BARRY CO   | 386004836 | REQUESTED   | 100% STA | Vehicle  | 0   |                    | REPLACE | 28     |
| 1998             | 1999   | BARRY CO   | 386004836 | REQUESTED   | SEC 5309 | Vehicle  | 1   | 35' bus 24+2       | REPLACE | 140    |
| 1998             | 1999   | BARRY CO   | 386004836 | REQUESTED   | SEC 5309 | Equipme  | 1   | Computer, Printer  | REPLACE | 4      |
| 1998             | 1999   | ONTONAGC   | 386004879 | PRE-REQUEST | SEC 5311 | Vehicle  | 0   | 18 Passenger cut   | REPLACE |        |
| 1998             | 1998   | BARRY CO   | 386004836 | REQUESTED   | 100% STA | Vehicle  | 4   |                    | REPLACE | 113    |
| 1998             | 1998   | CAPITAL AF | 381969989 | REQUESTED   | 100% STA | Vehicle  | 1   |                    | EXPAND  | 83     |
| 1998             | 1998   | BARRY CO   | 386004836 | REQUESTED   | SEC 5309 | Vehicle  | 1   | description 2      | REPLACE | 56     |
| 1998             | 1999   | BARRY CO   | 386004836 | REQUESTED   | SEC 5309 | Vehicle  | 1   | 25' 14+2 W/lift    | REPLACE | 112    |
| 1998             | 1998   | BARRY CO   | 386004836 | REQUESTED   | 100% STA | Vehicle  | 0   | description is now | REPLACE |        |
| 1998             | 1998   | BARRY CO   | 386004836 | REQUESTED   | SEC 5309 | Vehicle  | 0   | description 3      | REPLACE |        |

All capital requests for the state are displayed in this window. The user can now view the information in this window by employing the vertical and horizontal scroll bars.

The user can also sort, filter, and graph the data in this window, as covered in detail in Chapter 11. Sorting starts on page 11.12, filtering on page 11.14, and graphing on page 11.19.

## Prioritization

To access the capital prioritization information the user will first start PTMS as discussed starting on page 2.3. If the **Public Transportation Gateway** window is displayed, the user can click on **Cancel** to close that window.

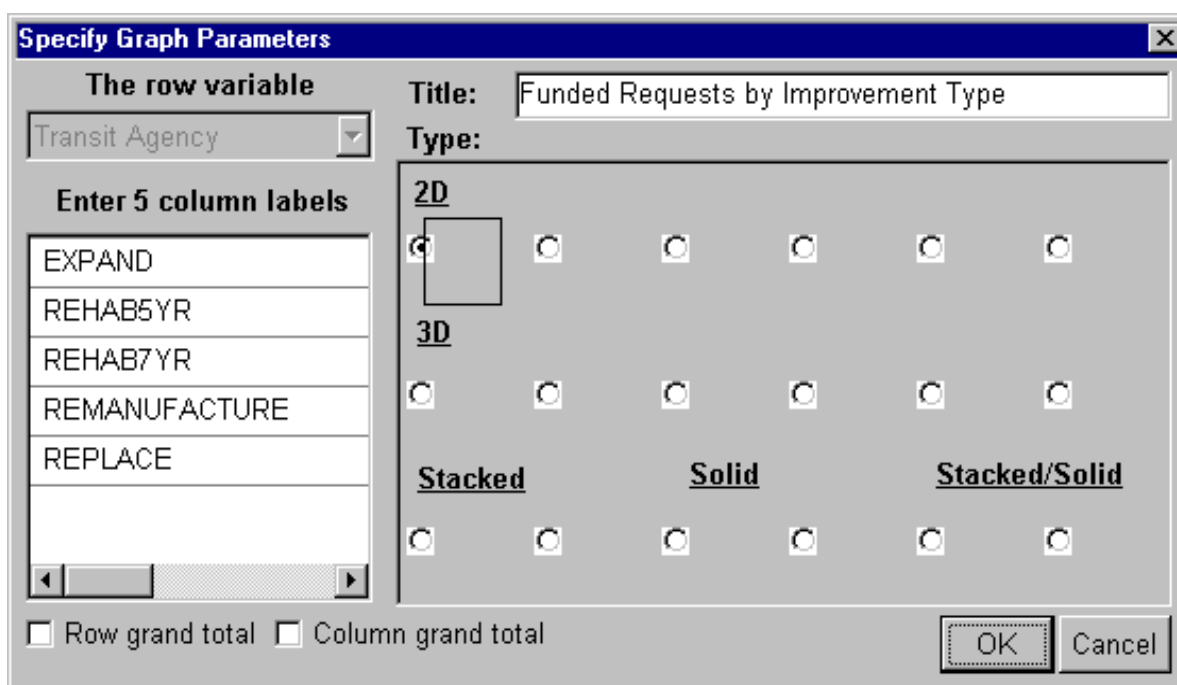
Once in the PTMS Main Menu window, the user can access the performance measures by selecting **Capital | Prioritization** from the menu bar. As a result of this action the **Capital Prioritization** window is displayed, as illustrated below.

The user will now use the filtering options at the top of the window to retrieve records into the bottom table section of the window. The option group at the left is always present, as is the Fiscal Year field. The **Transit Agency** and **Program** groups are only present when certain options are selected in the left group, such as **Funded Requests by Improvement Type** as illustrated above.

The user will make the desired sections in whatever options groups are present, indicate the desired Fiscal Year, and then click on the **Apply** button at the middle right. This action will cause PTMS to retrieve records meeting the indicated criteria into the table section at the bottom of the window.

Once the records are retrieved, the user can employ scroll bars to view all information. The user can also create graphs based on the information in this window. However the windows and process involved are somewhat different than those covered in Chapter 11, so the new method will be covered below.

To graph the information in the table section of the window, the user will point to that section and click the right mouse button to display the shortcut menu. The user will select **Graph** from the menu that is displayed. As a result a **Specify Graph Parameter** window similar to the one illustrated below will be opened.



The image shows a dialog box titled "Specify Graph Parameters". It has a blue title bar with a close button (X) in the top right corner. The dialog is divided into several sections:

- The row variable:** A dropdown menu currently showing "Transit Agency".
- Title:** A text field containing "Funded Requests by Improvement Type".
- Type:** A section with three sub-sections: "2D", "3D", and "Stacked/Solid". Each sub-section contains a grid of radio buttons for selecting graph types. The "2D" section has 6 radio buttons, the "3D" section has 6, and the "Stacked/Solid" section has 6.
- Enter 5 column labels:** A list box containing five labels: "EXPAND", "REHAB5YR", "REHAB7YR", "REMANUFACTURE", and "REPLACE". Below the list box is a scroll bar.
- Row grand total / Column grand total:** Two checkboxes at the bottom left, both currently unchecked.
- Buttons:** "OK" and "Cancel" buttons at the bottom right.

The user can select the field that will be on the X-axis via the picklist associated with **The row variable** field. Where it says **Enter 5 column labels** in the illustration above is a list of fields that will be graphed against the Y-axis. The user can replace the field names listed with more appropriate labels for the graph by clicking in the cell with the field name and replacing it with a desired label. By placing a mark in the **Row grand total** or **Column grand total** check boxes, the user can have PTMS calculate and graph the indicated grand total. In the **Title** field the user can enter the main title that will be printed on the graph. In the **Type** section the user can click on the type of graph that is desired. When all selections and entries are made, the user will click **OK** to display the graph. Once the graph is displayed the user can print or close the graph by using the command buttons in the lower right corner of the graph window.

## Condition Distribution

To access the condition distribution information the user will first start PTMS as discussed starting on page 2.3. If the **Public Transportation Gateway** window is displayed, the user can click on **Cancel** to close that window.

Once in the PTMS Main Menu window, the user can access the performance measures by selecting **Capital | Condition Distribution** from the menu bar. As a result of this action the **Condition Distribution Table** window is displayed, as illustrated below.

| Range | From | To |
|-------|------|----|
| 1.0   |      |    |

| # of Units | % Selected Group |
|------------|------------------|
|------------|------------------|

The user will first use the picklist associated with the **Indicator** field in the **Criteria** group to select the basis for the condition distribution. The options are AGE, HI, MILEAGE, and RSL. AGE is the default option. Once the Indicator field is set, the user will enter the desired range values in the **From** and **To** fields. If more than one range is desired, the user can press the **TAB** key while in the **To** field, which will create a new Range line. The illustration at the top of the next page shows a five range setup on age.

Condition Distribution Table

Criteria  
Indicator: AGE

| Range | From | To  |
|-------|------|-----|
| 1.0   | .    | 5.  |
| 2.0   | 5.   | 10. |
| 3.0   | 10.  | 15. |
| 4.0   | 15.  | 20. |
| 5.0   | 20.  | 25. |

| # of Units | % Selected Group |
|------------|------------------|
|------------|------------------|

Apply Close

Ready 7/20/98 3:46 PM

Note that when a new range line is created, the **From** field automatically takes the value of the previous **To** field. Also note that it is important to be careful not to add an extra range line by pressing **TAB** accidentally. There is no way to remove the extra range line, except closing and reopening, which deletes ALL range lines.

When the range or ranges are entered as desired, the user will click on the **Apply** button to cause PTMS to calculate the ranges indicated. The illustration on the top of the next page is the result of clicking **Apply** in the above illustration.

Condition Distribution Table

Criteria  
Indicator: AGE

| Range | From | To  |
|-------|------|-----|
| 1.0   | .    | 5.  |
| 2.0   | 5.   | 10. |
| 3.0   | 10.  | 15. |
| 4.0   | 15.  | 20. |
| 5.0   | 20.  | 25. |

| # of Units | % Selected Group |
|------------|------------------|
| 14         | 1%               |
| 273        | 12%              |
| 42         | 2%               |
| 57         | 3%               |
| 38         | 2%               |

Apply Close

Ready 7/20/98 3:48 PM

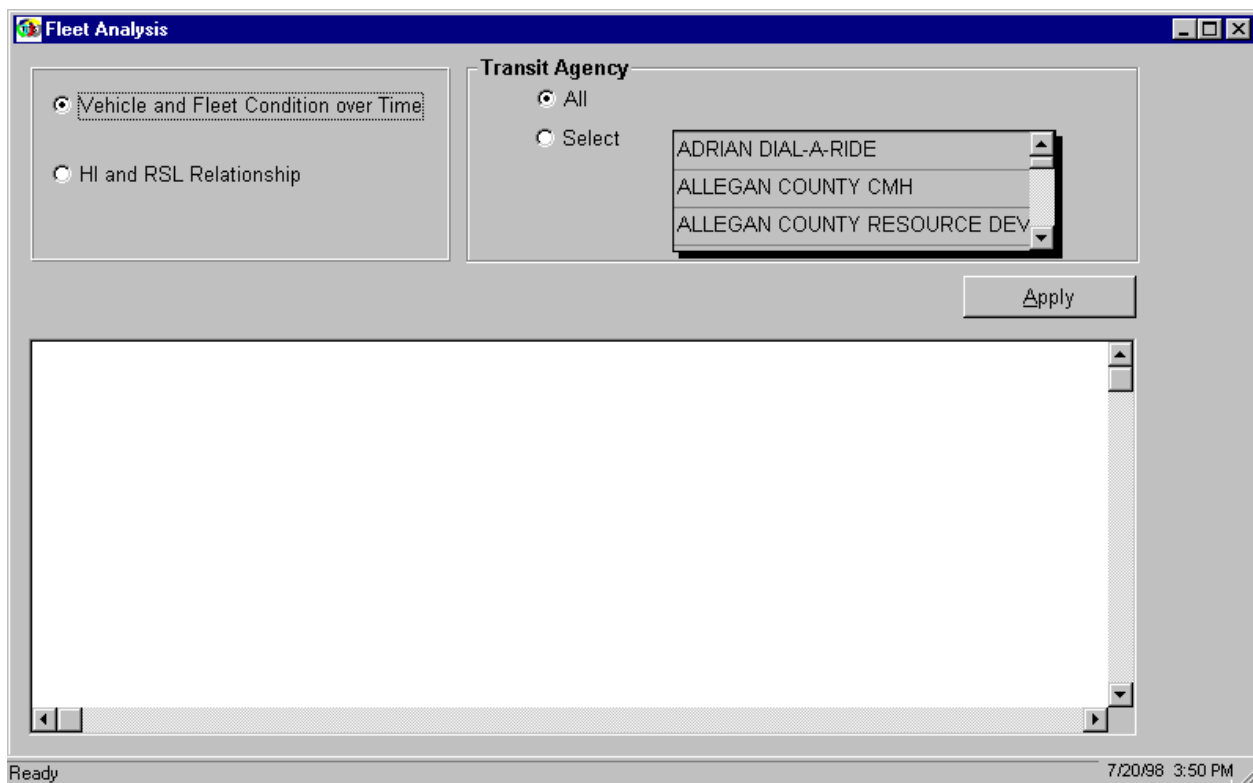
The results in the right group indicate both the number of units in each range, and the percent of the selected group that the number represents.

There is no way to edit the criteria and reapply. The user must close the window and start over to enter new ranges. When done with the window, the use can close by selecting the **Close** command button.

## Fleet Analysis

To access the fleet analysis information the user will first start PTMS as discussed starting on page 2.3. If the **Public Transportation Gateway** window is displayed, the user can click on **Cancel** to close that window.

Once in the PTMS Main Menu window, the user can access the performance measures by selecting **Capital | Fleet Analysis** from the menu bar. As a result of this action the **Fleet Analysis** window is displayed, as illustrated below.



The user will now use the filtering options at the top of the window to retrieve records into the bottom table section of the window. The option group at the left is always present. The **Transit Agency** group illustrated above on the right is present if **Vehicle and Fleet Condition over Time** is selected. If **HI and RSL Relationship** is selected, a similar group for **Vehicle Type** is present at the right.

# Capital Menu

The user will make the desired selections in the option groups, and use the provided picklists to indicated desired field values as appropriate. Once all selections and entries are made, the user will click on the **Apply** button at the right to retrieve the fleet analysis records into the lower table section of the window, as illustrated below.

| Transit Agency                      | 1996         | 1997         | 1998        |
|-------------------------------------|--------------|--------------|-------------|
| BARRY COUNTY TRANSIT                | 76.1         |              |             |
| BAY AREA TRANSPORTATION AUTHORITY   | 0            |              |             |
| LIVINGSTON ESSENTIAL TRANSPORTATION |              | 49.6         |             |
| OTSEGO COUNTY BUS SYSTEM            |              | 0            |             |
| MILAN PUBLIC TRANSPORTATION, CITY   |              |              | 0           |
| <b>Average</b>                      | <b>38.05</b> | <b>24.80</b> | <b>0.00</b> |

Once the records are retrieved, the user can employ scroll bars to view all information. The user can also create graphs based on the information in this window. See the section on Prioritization, page 11.19, for details of graphing.

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